



NASIG Newsletter

North American Serials Interest Group

Vol. 26, no. 3

September 2011

eISSN 1542-3417

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President's Corner

Steve Shadle, NASIG President

For those of you living through a summer of record-breaking heat, my commiserations. Come to Seattle, where the thermometer struggled to reach 84o on July 6th (before dropping back to 67o the next day) and it has rained 11 out of the last 19 days. As a long-time resident of the Pacific Northwest, I've learned to get my sunshine from other sources (such as NASIG conferences in locations like St. Louis and Palm Springs). Thinking back through all the NASIG conferences I've attended, there have only been a few with anything other than sunny days (the icy sleet and hail at Red Rocks outside of Denver stands out as a weather low-point in NASIG conference history).

Those of you who weren't able to attend the conference in St. Louis this year missed a great meeting. Conference Planning (under the leadership of Shana McDanold and Karen Darling) was fabulous with great local events ("OhMyGodAmIReallyGoingDownThisTen StorySlide...WHEEEE!") and food (to paraphrase Homer Simpson: "Gooley butter cakes. Is there anything they can't do?"). Program Planning (with chairs Anne Mitchell and Michael Hanson) did a superb job this year with thought-provoking vision presentations by Adam Bly and Paul Duguid and a good mix of strategy and tactics sessions. I know some catalogers felt they got the short end of the programming stick this year, but with an RDA preconference by Judy Kuhagen and sessions that included Regina Reynolds (and others), cataloging was amply represented in quality, if not quantity. As a cataloger, I do have to be occasionally reminded I am not the center of the universe...Hey, if

you catalogers want more conference presentations, submit proposals to Program Planning.

In this issue of the Newsletter, you will find reports of every conference program. As an active NASIG member, I always scan the current newsletter when it hits my inbox, but I read the September issue cover-to-cover to see what I missed at the conference. For those who want more information about a particular program, the presentation files for most of the programs are available in the “Conference Handouts” portion of the conference website. I would like to extend a big “Thank You” to all the conference reporters, Newsletter staff and Program Planning volunteers who make these resources available.

I would also like to comment on the brainstorming session this year. As we all adapt to a changing information landscape (“Evolve or Die”), NASIG also needs to adapt and evolve. Those of us in the serials community know the full extent of our work and that the word “serial” does not necessarily embody it. Yet, the name NASIG has brand recognition. Personally, I was pleased to hear a consensus that we should retain NASIG as the name of the organization, but we need to investigate ways to more clearly articulate our role in this evolving landscape. I think Bob Boissy’s tagline (“NASIG: 80% of Your Library’s Materials Budget”) was most humorous and to the point, but I think each of us can imagine how NASIG can better help us through continuing education, networking, mentoring and open communication. The Executive Board will be reviewing the notes from the brainstorming session with an eye towards next steps we can take in this evolution.

On a related note, I am also pleased to highlight the appointment of the Core Competencies Task Force whose charge is “to develop a statement for NASIG’s endorsement that describes core competencies for serials and electronic resources librarians.” With this kind of statement, I hope we as a community can more clearly articulate our value and, as an organization, can develop resources and services that will help you in your day-to-day work. A draft report from the task

force will be to the Board this fall with a final draft to the membership in the spring.

A reminder. The call for nominations for vice president/president-elect, secretary, and three members at large has been issued. The Nominations & Elections Committee will receive your nominations until October 17th. Nominations are anonymous, and you may submit multiple names for one office. As always, self-nominations are welcome!

And finally, every new President gets asked the questions: “What’s on your agenda? What do you hope to accomplish?” On my most insecure days, it’s nothing more than making sure NASIG doesn’t go bankrupt while I’m in office (I assume most presidents have the occasional “Oh crap, what am I doing here?” moment). However, on most days it’s about bringing value to your NASIG membership. We’ve made good progress by negotiating discounted registration for NISO webinars and other NASIG-sponsored continuing education, and also by negotiating a greatly discounted subscription to Serials Librarian. Since the conference is our signature activity, I would like to see us leverage the conference in new ways. One possibility is to take the “best of the best” of conference presentations and make those presentations more widely available to membership through affordable online conferencing and regional continuing education events. If you have any additional ideas on how we can add value to your membership, please let me know.

Thanks to all of you for making this a great organization.
--Steve

Upcoming Conference News

CPC Update -- 2012 Conference in Nashville

Ann Ercelawn and Beverly Geckle, co-chairs

Planning for the 2012 conference June 7th- 10th in Nashville, TN “Music City USA” is well underway. The theme of the conference is NASIG 2012: Creating Harmony from Dis-Chord. The logo is currently being

designed and will be posted to the conference website when it is finalized.

We think attendees will enjoy their stay at the Sheraton Music City Hotel (<http://www.sheratonmusiccity.com/>).

Each guest room has either a balcony or patio and attendees will have free wireless internet. The hotel offers many options for relaxation. In addition to the 24-hour fitness facility and business center, there are indoor and outdoor pools and in house spa services. A hotel shuttle offering complimentary transport to the hotel is available; additionally, the shuttle offers transport to nearby restaurants and services within a two mile radius. Parking at the hotel is free.

Room rates for the hotel will be: single, double, or triple: \$129.00; quad: \$149, plus taxes. These rates will

be offered for three days prior and three days after the meeting dates, so take a few extra days to see the sights in the area. A special registration site will be available at a later date.

The CPC is working on organizing events and activities in the city of Nashville. Got talent? There are plans to have an open-mic night at the hotel.

Since two very large music festivals (CMA Music Festival and Bonnaroo) are scheduled for the same dates, we encourage you to drive to Nashville if at all possible. For those who know they will be flying to Nashville we encourage you to book your flights early.

Stay tuned for further updates.

26th Conference (2011) Wrap Up

Minutes for the 2011 Conference Business Meeting

Hilton St. Louis at the Ballpark, St. Louis, MO

June 3, 2011

The meeting was called to order at 4:06 p.m.
Katy Ginanni introduced Bob Persing, parliamentarian for the meeting.

Highlights from the Past Year of Activity by the NASIG Executive Board (Presented by Katy Ginanni)

- Created an Electronic Resources Librarian Core Competencies Task Force.
- Completed a job description for a NASIG Photo Historian to make sure we photo-document conferences.
- Created a formal job description and formed a search committee to find a successor to Joyce Tenney, Conference Coordinator extraordinaire.
- Continuing to explore combined programming with SSP (Society for Scholarly Publishing).
- Implemented organizational membership.

- Continued arrangement with NISO which allows NASIG members to get NISO member rates.
- Gave financial support to the following conferences: NC Serials Conference, MidSouth eResources Symposium (at Mississippi State University), OVGTSL (Ohio Valley Group of Technical Services Librarians), ER&L (Electronic Resources & Libraries)
- Offered paraprofessional rate for this conference for the first time
- Brought back NASIG-L!

Secretary's Report

We'll soon be doing a flyer instead of membership brochures. It will be easier to update, and we can direct people to website.

The board met with a consultant just before the 2010 Annual Conference. Over the past year, the board has been discussing the results, and some action items have already been sent to committees. We will soon be turning the contingency planning documentation into a public document for the membership to discuss and provide feedback. We will release chunks on NASIG-L for discussion and collect feedback to bring back to board and/or committees.

Treasurer's Report (Presented by Lisa Blackwell)

The treasurer reports that the checking and savings accounts are earning interest. We have \$503,737.86 total in accounts. Thirty-six organizations sponsored the NASIG conference for a total of \$57,455.00. Committee expenditures are currently slightly over half of what was budgeted, which is good. Committee budgets run on a calendar year.

Introduction of the 2011-2012 Board (Presented by Eleanor Cook, Nominations & Elections Committee Chair)

Cook introduced incoming and continuing members of Board:

Administrative Officers

Steve Shadle, president
Bob Boissy, vice-president/president-elect
Katy Ginanni, past president
Carol Ann Borchert, secretary
Lisa Blackwell, treasurer
Jennifer Arnold, treasurer-elect

Members At Large

Patrick Carr
Clint Chamberlain
Stephen Clark
Buddy Pennington
Jenni Wilson
Allyson Zellner

Ex Officio

Angela Dresselhaus, editor-in-chief, *NASIG Newsletter*

Cook reminded members about nominations form in the conference packets. Thank you to the members of N&E for all of their work this year!

Recognition of Outgoing Board Members and Committee Chairs (Presented by Chris Brady, Awards & Recognition Committee Chair)

- Awards & Recognition: Chris Brady
- Conference Planning: Karen Darling and Shana McDanold

- Conference *Proceedings*: Lori Terrill
- Continuing Education: Kelli Getz
- Database & *Directory*: Maggie Ferris
- Electronic Communications: Nancy Beals and Beth Ashmore
- Evaluation & Assessment: Smita Joshipura
- Financial Development: Elizabeth Parang
- Student Outreach: Kara Killough
- Membership Development: Janet Arcand
- Mentoring: Gracemary Smulewitz
- Nominations & Elections: Eleanor Cook
- Program Planning: Anne Mitchell
- Publicist & Public Relations: Kathryn Johns-Masten and Betsy Appleton
- Member At Large: Patrick Carr
- Member At Large: Steve Kelley
- Member At Large: Christine Stamison
- Past President: Rick Anderson
- President: Katy Ginanni

Discussion of Old Business

There was no old business.

Call for New Business

There was no new business.

Business meeting adjourned at 4:34 p.m.

Submitted by

Carol Ann Borchert, Secretary, NASIG Executive Board
June 14, 2011

Minutes approved by the NASIG Executive Board on
June 27, 2011



Brainstorming Session Notes

Hilton St. Louis at the Ballpark, St. Louis, MO

June 3, 2011

Brainstorming Topic: The NASIG Name, Vision, and Mission

Session facilitated by: June Garner

During the 2010 brainstorming session, there was some brief discussion of the NASIG name, and whether we should think about altering or changing it. This is something that the executive board has discussed over the last several years. That topic seems to lead into something that came up during last year's contingency planning session: whether or not NASIG needs to re-define our vision and mission statements.

Garner called for a show of hands for academic librarians, special librarians, and vendors. The majority of the group were academic librarians. She showed the tag cloud from the two-word exercise where members offered the two words they would like to use to describe NASIG.

Do we want to change our name? Do we want to revamp our vision and mission statement? What direction do we want to take? More focus on continuing education?

- Several comments about the strength of the NASIG brand. People know what it is.
- It's all about branding and NASIG has a brand. To change name could be detrimental to us unless we have EXTREMELY strong marketing behind that. As an all-volunteer organization, that would be difficult to achieve. Likes what UKSG did and maybe NASIG could follow in pattern of our "big sister." It worked for AT&T and OCLC. Several people agreed.
- Take electronic resources into our scope. "ER" is in sERials. Community is a big and important part of what we are.
- NASIG objectives: nothing about consortia, but a lot of us are members of at least one. Bring

continuing education to the forefront, including education of provosts and other constituents.

- Develop a focus in the annual conference that would appeal to those on the periphery of serials issues.
- Question about wisdom of broadening our mission.
- There has been concern in the past about our focus on North America.
- Few "Serials Librarians" anymore. Many of those are now paraprofessional positions. Deans don't view this organization as still being relevant.
- NASIG is educating those who interact with serials, administration, and all kinds of staff.
- Serials are now e-resources, collection development, the whole thing. What does "serials" mean to us versus what it means to others?
- As a cataloger, doing reports, batch loads—more database maintenance, but still dealing with print. Still need print in mission as well as electronic.
- Is this organization still relevant in the professional field? Sponsorships say we are. If print is such a small portion of budget, why do libraries continue to put so much time into it in terms of staff? This is the most fun you'll ever have learning a hell of a lot.
- It's a concern that attendance is now half of what it was 10 years ago. We're almost getting too small for hotels now. Cost of attendance and speaker benefits need to be examined. Some perceive us as a fairly expensive conference.
- There are a lot more conferences now and a lot less money for institutions to send people.
- "Serials" has an old-fashioned ring; is "journals" a better word to use? Use webinars to spread continuing education efforts more broadly. Preaching to those for whom "serials" is a foreign world. Systems people and data manipulators don't understand serials issues. Emphasize tracks more.
- Conference is a pretty good deal for what we get. Educate people more about everything that is involved in serials—electronic, microfilm, paper, etc.
- Summary: Keep the NASIG brand. Update vision and mission. Educate others about serials, not just serials people.
- Broadcast conference programming.
- We don't really know why people aren't coming who used to be coming. Poll people who used to be members and/or attendees to see why they left.
- Maybe a tagline instead of spelling out NASIG.
- Possible slogans up on screen:
 - NASIG: 80% of your materials budget

- NASIG: Redefining serials
- NASIG: Theoretical foundation, pragmatic problem-solving
- This conference is the best value for the money, has the most relevant programming.
- It's not the word "serials" that's problematic; it's the phrase "interest group" that makes us sound minor.
- Mark Lane (the consultant from the contingency planning session) had suggested we come up with 2 words to describe NASIG and use it in all of our marketing.
- Continuing education—the Board is discussing getting more continuing education this year, including webinars.
- The Board has discussed the possibility of making sessions here available somewhere on the web.
- Many library schools don't mention serials at all, mostly an afterthought. Continue outreach to library schools. Suggested tagline: NASIG: It's not just magazines anymore.
- Why don't we do a joint conference with ER&L?
- Best RDA webinars she has heard have come from people with a serials background. We should fill that hole with webinars.
- 80% of library materials budgets, not just materials budgets.

Submitted by

Carol Ann Borchert, Secretary, NASIG Executive Board
June 14, 2011

Submitted by

2011 Evaluation & Assessment Committee:

Smita Joshipura (Chair), Barbara McArthur (Co-Chair), Christina Torbert, Janice Lindquist, Jennifer Leffler, Maria Hatfield, Sally Glasser, and Virginia Rumph

NASIG's 26th annual conference was held in St. Louis, Missouri. The conference featured three pre-conferences, two vision sessions, nine strategy sessions, fifteen tactics sessions, and seven poster sessions. Other events included first timers/mentoring reception, a vendor expo, an opening reception at the City Museum, and informal discussion groups.

This year, 294 of the 377 conference attendees completed all or part of the online evaluation form. This 78% response rate reflects an increase of 10% from last year's response rate of 68%. The periodic reminders on NASIG-L and Facebook have increased the response rate this year. This was the fourth year that the evaluation forms were available online. A PDF of the survey was also provided on the NASIG website for attendees to use during the conference. Those who completed the online evaluation form were also eligible to enter a drawing for a free conference registration. The winner will be announced in the *NASIG Newsletter*.

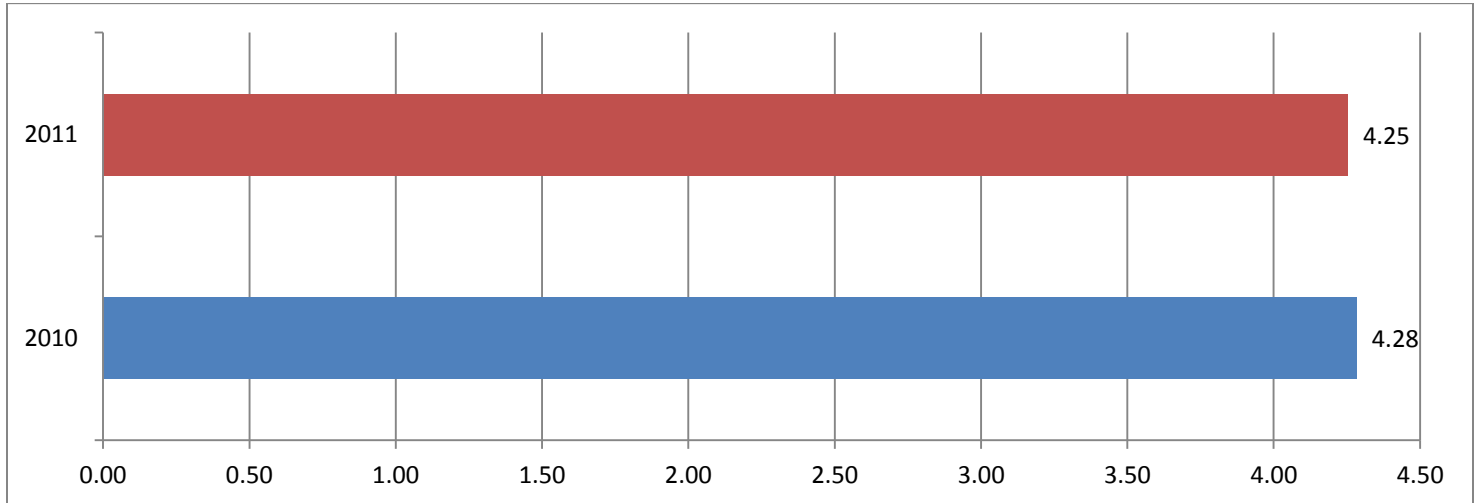


NASIG GATEWAY TO COLLABORATION 2011

June 2-5, 2011

Conference Rating

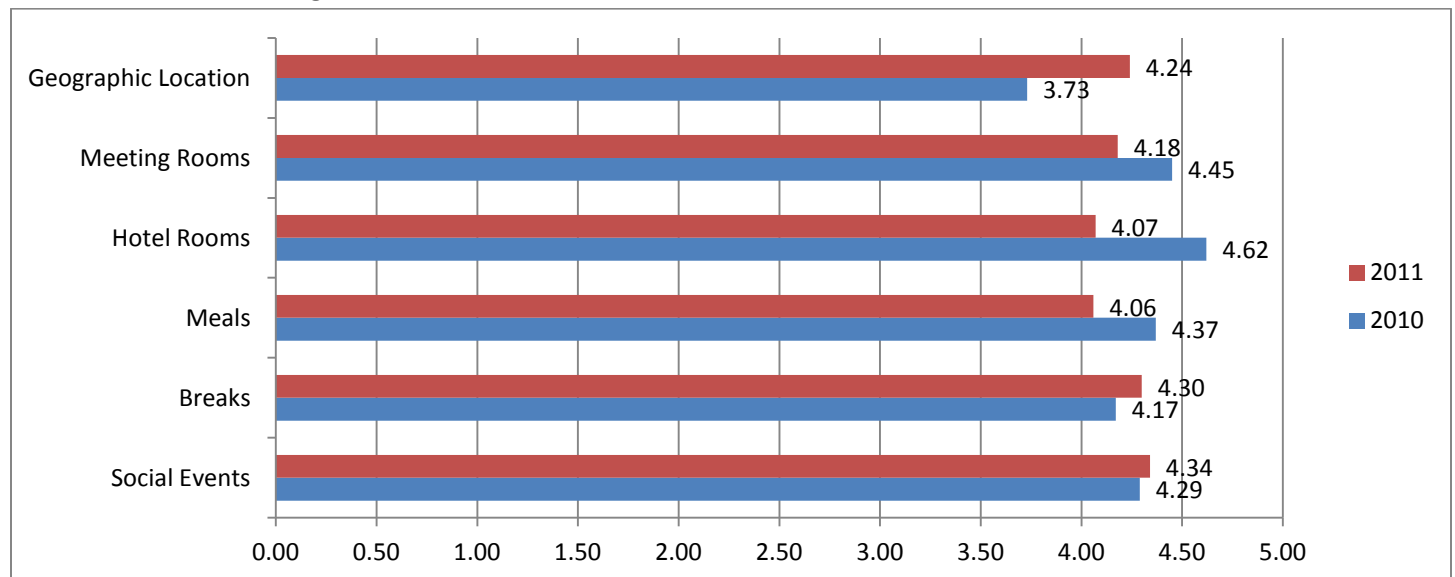
Overall Conference Rating:



Respondents were asked to give ratings on a scale of 1 to 5, with 5 being the highest rating. The overall rating for the 2011 conference was 4.25, which is almost equal

to last year's conference at Palm Springs, CA, which was rated 4.28 overall.

Facilities and Local Arrangements:



Ratings for the facilities and local arrangements for this year's conference are almost equal to those of last year's conference in most of the categories except for geographic location, meeting, and hotel rooms. The St. Louis conference is rated 4.24, which is higher than the Palm Springs conference, rated at 3.73. Many commented that they liked the place and the conference's proximity to downtown, the Arch, Ballpark, and other surrounding places.

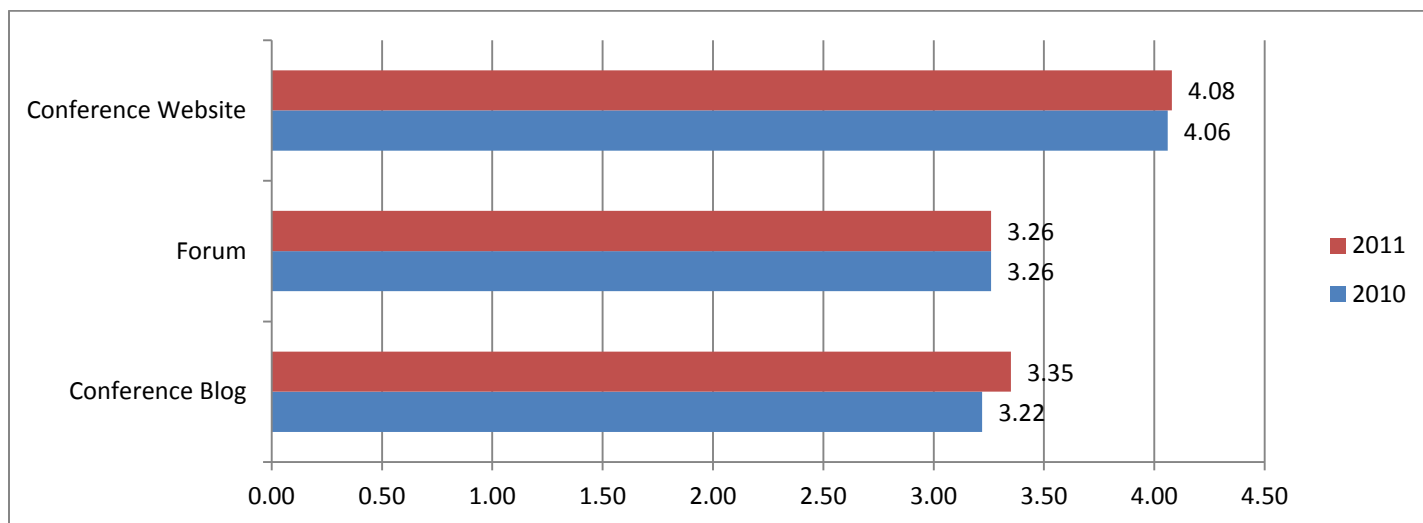
The meeting rooms (4.18) and hotel rooms (4.07) received somewhat lower ratings than last year, which were rated at 4.45 and 4.62, respectively. There were multiple comments about hotel and meeting rooms, such as: elevators were not working efficiently; noisy atmosphere due to construction, as well as proximity to the baseball stadium; not accessible for people with disabilities; and the meeting rooms had problems with audibility due to their layout, such as rooms being too

long/narrow. However, many respondents also provided positive comments about complimentary internet access in these rooms, as they considered this a core service.

The meals (4.06) were rated slightly lower, while the breaks (4.30) were rated higher this year than last year's ratings, which were 4.37, and 4.17, respectively.

There were many comments regarding missing the group meals such as the dine-around and the lunches. Social events (4.34) were rated slightly higher than those of Palm Springs (4.29). Attendees were overwhelmingly pleased with the opening reception at City Museum, and the majority commented that they loved the fun and food at City Museum. They also enjoyed an evening at the baseball game.

Online Conference Information:



Other conference information, including the conference web site (4.08), forum (3.26), and conference blog (3.35), were rated almost the same as last year, which were 4.06, 3.26, and 3.22, respectively. Several attendees said that they did not use the blog and/or forum. Many commented that this could have been better publicized. Also, there was a recommendation to make it mobile-friendly.

NASIG again used an online store (CafePress) for conference souvenirs. Most respondents (78%) have not visited the store, nor have any opinions. About 20% liked the selection of items, while 1.2% did not like them. Some indicated that they would prefer a wider variety of shirt colors and better quality. Some participants said that they might buy souvenirs on site, but did not think about going to the online store. Also, it was suggested to have more marketing about CafePress on the blog and the Facebook page.

Many attendees expressed their gratitude to the conference planning committee and the program planning committee for all their hard work.

Program

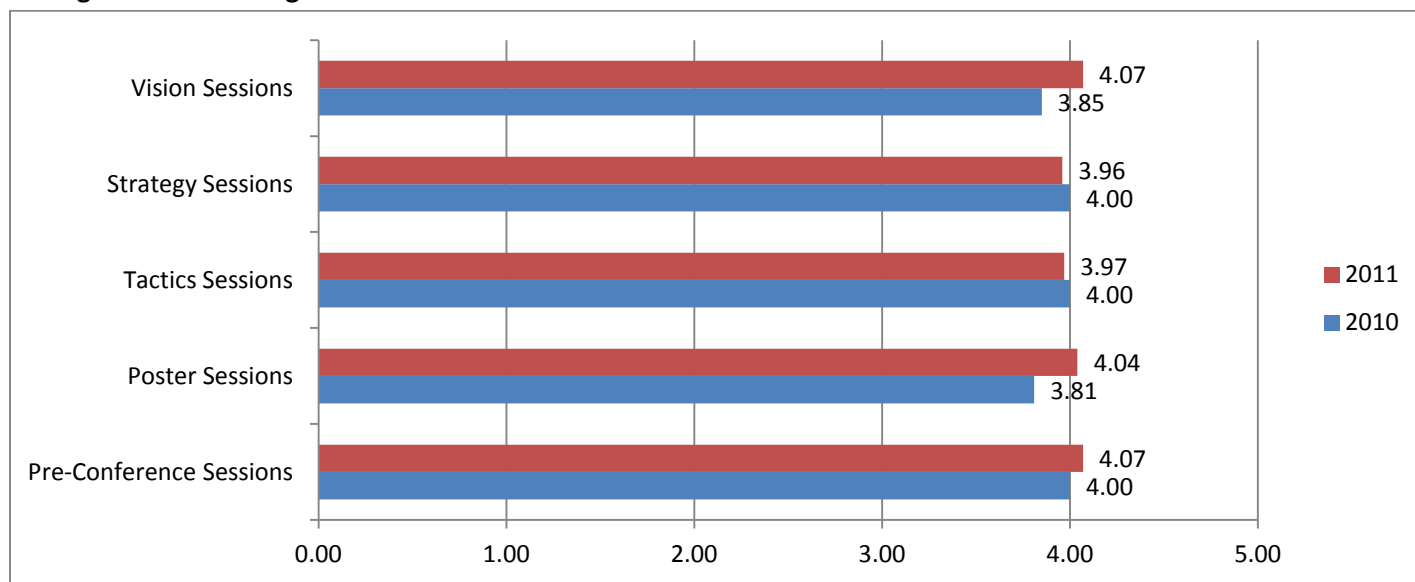
Respondents were asked about the balance in the types of programs offered. This aspect rated 3.97, which is slightly lower than Palm Springs conference, which was 4.02. Many respondents commended on program selection, where there was a wide range of topics covered by knowledgeable speakers. The most repeated comment expressed on the balance of the program was the perceived lack of cataloging/metadata related sessions.

This year the program also followed a 'no-repeat' format where sessions were not repeated. Respondents were asked if the layout and explanation of program choices were easy to understand. This area received a 4.12 rating, which is slightly lower than last year, which was 4.16. Some commented that the layout was slightly

confusing as Tactics and Strategies sessions on the program were difficult to follow, and suggested to list

the sessions in chronological order. Also, there is a suggestion to make it easy to use on mobile devices.

Average Sessions Ratings:



This year the conference featured two vision sessions. Adam Bly's "Science Re-Imagined" received a 3.95 rating. Paul Duguid's presentation, "Books in Chains," received a 4.19 rating. The average rating for vision sessions this year is 4.07, which is higher than last year's rating of 3.85.

The nine strategy sessions this year generated ratings ranging from 3.63 to 4.51 with an average rating of 3.96, which is slightly lower than that of the last year (4.0). The highest rating was given to "Continuing Resources and the RDA Test" (4.51). Two other sessions were rated above 4.0: "No Substantial Penalty for Withdrawal: Investing in a Different Collaborative Model for the Shared Print Archive" with 4.25, and "Leaving the Big Deal: Consequences and Next steps" with 4.21.

Fifteen tactics sessions were offered in St. Louis. Ratings ranged from 3.21 to 4.61 with an average of 3.97, which is slightly lower than the last year's 4.0. Nine sessions scored 4.0 or higher, with the highest rating going to "Humble PIE-J and What [is] ISO 8: National and International Efforts towards Improved

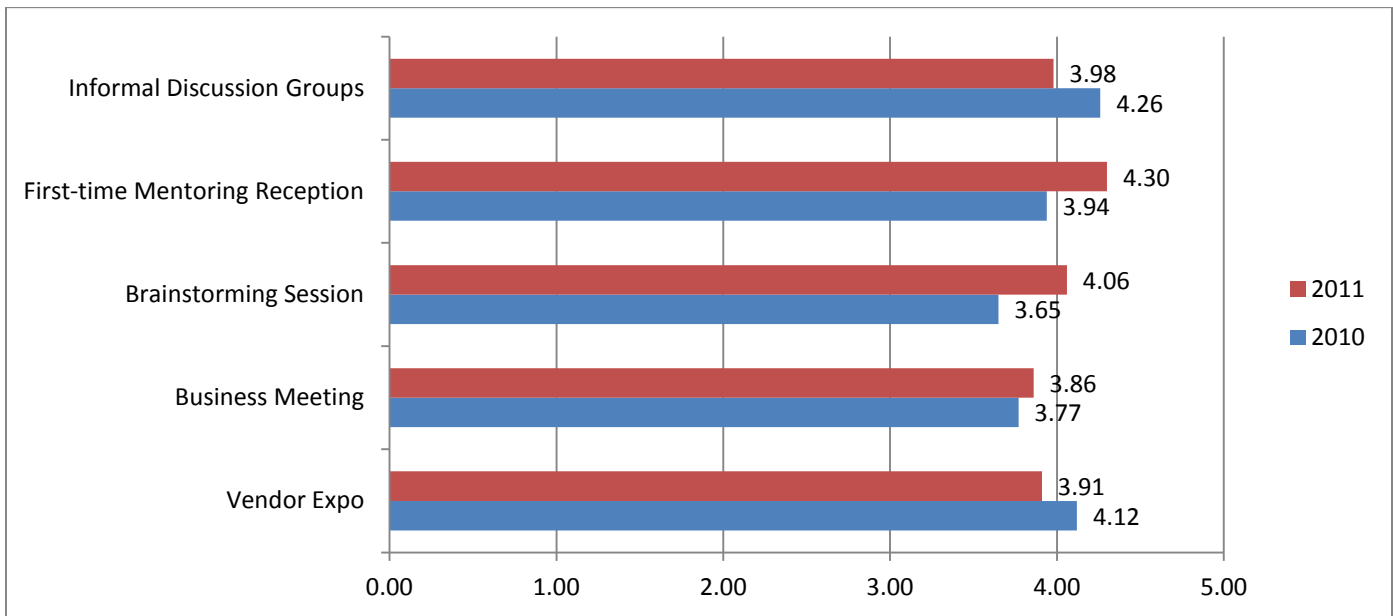
Journal Presentation and Identification" presented by Robert Boissy, and Regina Romano Reynolds.

Seven poster sessions were presented this year. Ratings ranged from 3.84 to 4.21, averaging 4.04, which is higher than last year's 3.81. The poster titled, "The @One eReader Bar: eReader exploration at the University of Nevada, Reno Knowledge Center" by Lisa Kurt and Erin Silva received the highest rating of 4.21.

Three pre-conferences featured this year with ratings varying from 3.0 to 4.85, with an average rating of 4.07, which is higher than last year's 4.0. Judy Kuhagen's, "Serials and RDA: An Ongoing Relationship" received the highest rating of 4.85.

The rate of attendees filling our poster session and pre-conference evaluations was up from last year. In 2011, an average of 100 people rated each poster session compared to an average of 62 people in 2010. The pre-conference was rated by an average of 22 participants. In 2010, pre-conferences received an average of 18 respondents.

Other Conference Events



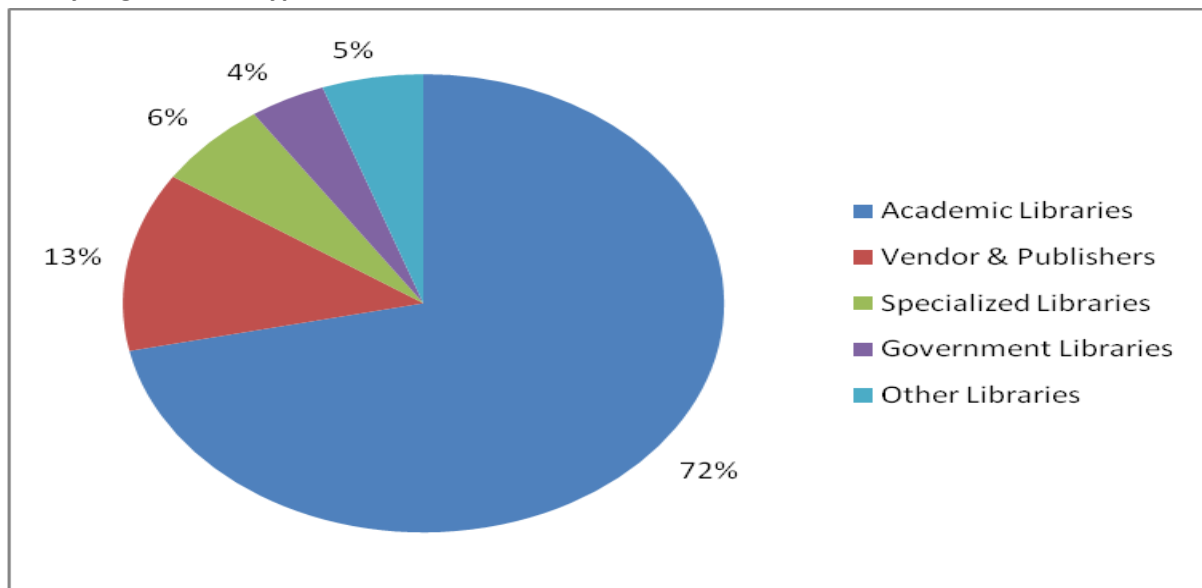
This year the informal discussion groups is rated 3.98, which is lower than the last year at 4.26. There are several comments about too many choices of groups to select, and has been suggested to have fewer offerings.

The First-Timers/Mentoring Reception rated 4.30, which is higher than 3.94 in 2010, with 87% of respondents favoring the continuation of this event in the future. The Brainstorming Session received a rating of 4.06, which is rated higher than the last year of 3.65. As

many as 75% of respondents would prefer to continue this event in the future. The Business Meeting rated a 3.86, which is slightly higher than 3.77 in 2010. The Vendor Expo was rated at 3.91. Though, it is rated lower than the last year, which was 4.12, 83% responded to continue this session in future. However, there were multiple comments about the timing of the event, as not all conference attendees arrived early enough to attend the Expo.

Respondent Demographics

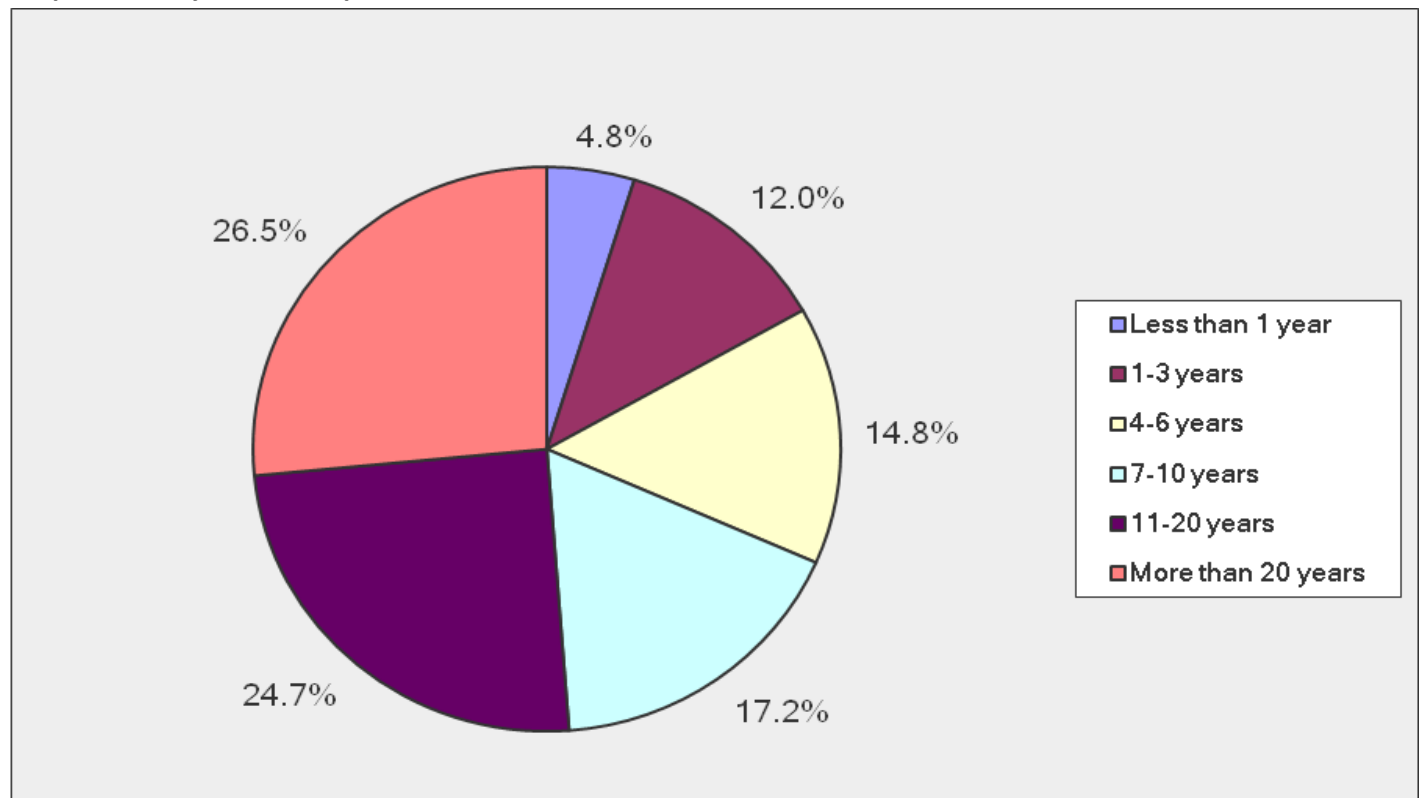
Respondents by Organization Type:



Academic library employees continue to represent the largest group of respondents (72%). This cohort includes university (179), college (29), and community college (2) librarians. Responses from the vendor and publisher community, including subscription agents (16), publishers (13), database providers (4), automated systems vendors (2), and book vendors (2) comprised 13% of the total respondents, higher than last year's 8%. Attendees from specialized libraries including medical (10), law (6), and special or corporate libraries (2) made up 6% of respondents, which is almost half of the last year's 11.7%. There were 12 attendees from government, national and state libraries, which represent 4.1%, same as last year. Other types of institutions included public libraries (5), students (2),

library network, consortium, or utility (3), professional association (1); and those selecting 'other' (5), which represents 5.4%, slightly lower than the last year's 6.1%. Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (49.5%), followed by electronic resources librarians (42.5%), acquisitions librarians (27.1%), and catalog/metadata librarians (26.2%). Collection development librarians comprised 15.9% of respondents, licensing rights managers (13.6%), and technical service managers (14.5%). Reference librarians comprised 13.1% of the respondents. All other categories were selected by less than 10% of respondents.

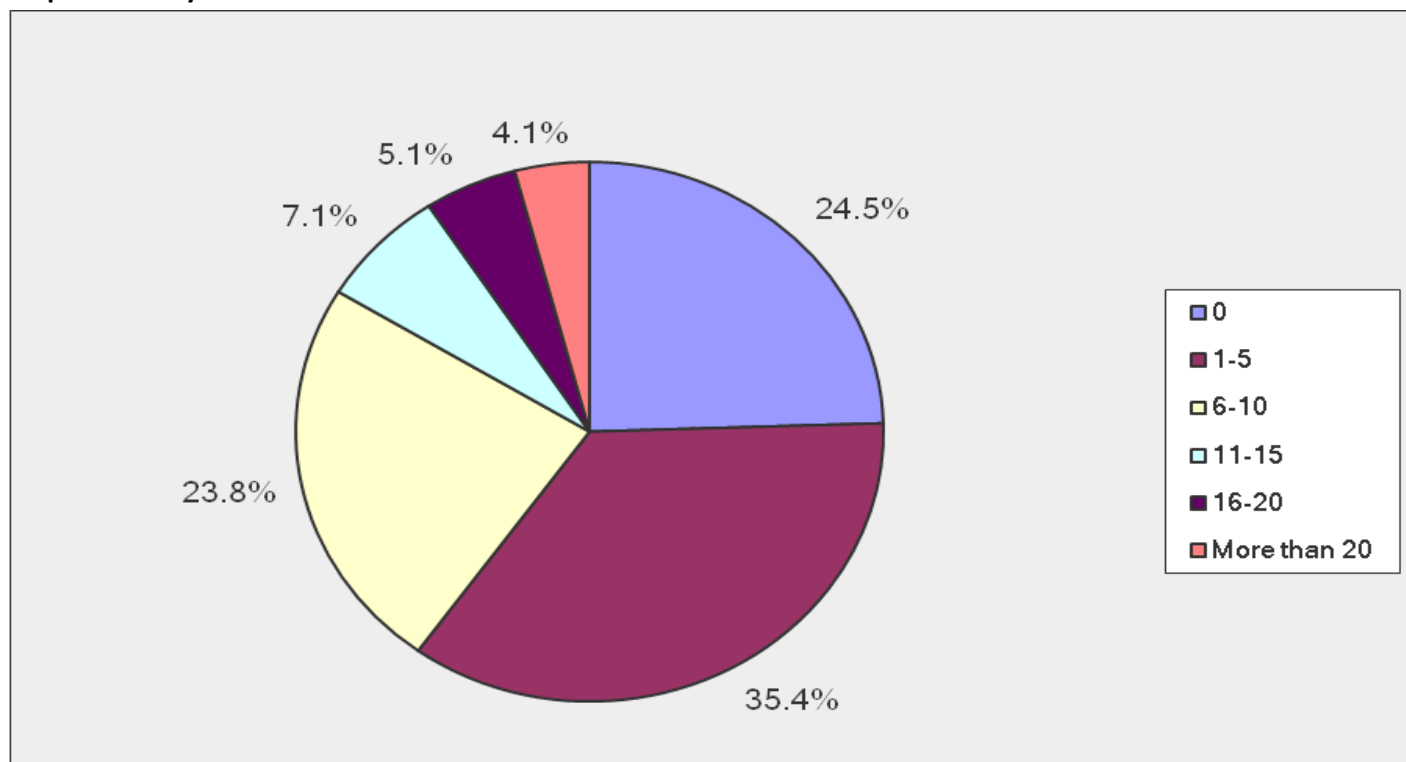
Respondents by Years of Experience:



When asked for the amount of serials-related experience, the majority of respondents are in the categories of more than 20 years (26.5%) or 11-20 years

(24.7%). Those with 10 or less years experience comprised 48.8% respondents, (less than one year: 4.8%, 1-3 years: 12%, 4-6 years: 14.8%, and 7-10 years: 17.2%).

Respondents by Number of NASIG Conferences Attended:



Most respondents were repeat NASIG attendees: 35.4% respondents had attended 1-5 previous conferences, 23.8 % had attended 6-10, 24.5% were first-timers, 7.1% had attended 11-15, 5.1% had attended 16-20, and 4.1% had attended for more than 20.

The Evaluation & Assessment Committee would like to thank everyone who took the time to complete the online evaluation form. We continue to be impressed each year with the thoughtful comments and suggestions that reflect a strong interest in continuing to improve upon the high quality conference NASIG puts on each year. Your comments and feedback are essential to the success of future NASIG conferences.



NASIG GATEWAY TO COLLABORATION 2011

Interview of Elizabeth Siler Electronic Resources Librarian, Florida International University and the John Merriman Joint NASIG/UKSG Award Winner for 2011

Sandy Folsom, Cataloger, Central Michigan University

Can you start by describing your current position and how you've been involved with serials?

I am currently the Electronic Resources Librarian at Florida International University and have been at my position a little over a year. Much of my job consists of ordering, licensing and managing the access to our electronic journals and databases. I maintain the libraries knowledgebase and ERM as well as collect and analyze the usage statistics for our electronic resources.

Can you tell us what initially led you to NASIG and why you continue to stay involved?

While I was studying to earn my MLIS, I worked as graduate assistant and intern in the Electronic

Resources department at the University of Kentucky Library. My supervisor encouraged me to attend the 2009 NASIG conference in Asheville. At the time I was determining whether or not to take a summer class and I decided instead to use the funds to attend the conference. I am especially glad that I did. Many of the sessions covered current issues that libraries were facing involving serials and electronic resources, that had not yet been introduced into the classroom. I felt the conference introduced me to the world I would eventually enter upon graduation. Once I graduated, I knew NASIG would be an important resource for learning about the latest trends concerning serials and electronic resources and I have continued to be a member.

**What prompted you to apply for the Merriman award?
How did you react when you found out that you were the recipient?**

I received the call for applicants for all the NASIG awards and was perusing the different opportunities when I came across the section on the Merriman Award. Since starting my position, I have realized that the issues I face every day when working with electronic resources are the same issues librarians deal with all over the world and I was interested to see how librarians from different countries handled these issues. I thought by attending the UKSG I'd get a different perspective on the work that I do. When I received the news that I had been selected as the recipient, I was absolutely shocked. As someone who is new to librarianship and has only just started my career, I was honored to be selected for such a prestigious award. I was also a little nervous because I did not know if I was fully prepared for this new conference experience, but I figured I would gain new and valuable knowledge if I jumped right in.

What were your first impressions of the UKSG conference?

My first impression, after leaving the fog of jetlag, was that Harrogate was beautiful and I couldn't believe how unbelievably lucky I was to be able to attend a

conference in such a wonderful place. Once I actually stepped foot into the conference center, it felt very similar to other conferences I have attended, but different because I was surrounded by accents from countries that would normally not fill up the room at a conference in the U.S. At first I was a little uneasy as a newcomer, but I met some very friendly delegates who put me at ease.

How was the UKSG conference different from the NASIG conferences that you've attended?

I have only been to one NASIG conference so this would be a one on one comparison. One difference I noticed was there were more group plenary sessions and less breakout sessions at UKSG than at NASIG. The plenary sessions that included several different speakers on similar subjects were especially interesting and informative. On the more social side, another difference was the big party at the end of the conference. It was a beautiful dinner and a fun night of dancing that I really enjoyed. Unfortunately I didn't realize I needed to dress up in sparkles and left all my sparkles in the States.

What was your favorite UKSG session and why was it your favorite?

There were many sessions that I really liked so it is hard to choose. One that I especially enjoyed was the chaired debate between Steven Hall from IOP Publishing and Alma Swan from Key Perspectives during the plenary session 5 about open access publishing. Open access publishing is a newer concept that is in its early stages and it was interesting to hear from a publisher and an OA advocate about where they felt the future is heading and how we are going to get there. I think the debate format is an exciting way to discuss current issues librarians and publishers are facing in the ever changing world of serials.

How do you think the experience of attending UKSG will affect your career?

Attending the UKSG conference has encouraged me to

attend more conferences in the future as well as get more involved in different library organizations. The chance to work with colleagues from different types of libraries and different places around the world is invaluable and necessary to be an effective librarian and to serve my local library properly. I also realized just how much fun you can have at these conferences and I can't wait to attend another one soon.

What are the differences between the two organizations, USKG and NASIG?

As I am new to both organizations, I do not think I can pinpoint anything specifically, as they are both organizations of librarians and publishers dedicated to tackling the complicated issues involved in working with serials and electronic resources. I did notice that UKSG has many organizational members, including universities, publishers and other interested organizations, whereas NASIG primarily has individual members. This can definitely change the make-up of conference attendees.

For those who might be interested in going to UKSG and perhaps applying for the Merriman award, what advice would you give them?

If you are at all interested in attending this event, you should apply. Be sure to review the program, if it is available, and view video and documentation from previous conferences to make sure this conference will benefit you. Mostly, if you chose to go the conference, try to get involved and talk to as many people as possible. There are so many amazing people at this conference with years of experience and expertise that you can learn from. I must admit that I did not follow this advice as well as I could have, because I was slightly overwhelmed by the entire experience, but if I had a chance to go back, and hopefully I will someday, I would try to get to know as many delegates as I could.

Is there anything else you'd like to share with us about your experience as a Merriman award winner?

I feel incredibly fortunate to have been given the

opportunity to attend the UKSG conference. It was a wonderful experience that I will always treasure. I would like to thank the committee for choosing me as the 2011 recipient of the award and I look forward to working with NASIG and UKSG in the future.

Report on the 2011 NASIG Award Winners

Jessica Ireland, Awards & Recognition Chair
Sandy Folsom, Awards & Recognition Vice-Chair

During the 2011 conference in St. Louis, the Awards & Recognition Committee presented the following awards: four Student Grants, one Mexican Student Grant, two Fritz Schwartz Serials Education Scholarships, two Serials Specialist Awards, one Horizon Award for new serials professionals, and one Rose Robischon Scholarship for professionals needing financial assistance to attend the conference.

The award winners were asked to give feedback about their overall conference experience, and they were also given the opportunity to suggest improvements to the awards process. The responses to the Awards & Recognition Committee's survey are included below. The award winners shared many positive comments about their experience during the conference and how attending the conference benefitted them personally.

2011 NASIG Awards Winners' Survey

Conducted by Yümin Jiang

Do you feel it is worthwhile for newcomers to the field of serials and continuing resources to attend a NASIG conference? Please explain. If you are a Serials Specialist Award winner, do you feel it is worthwhile for serials specialists to attend the conference? Please explain.

- Yes, I feel it is worthwhile for serials specialists to attend the NASIG conference. Specialists usually work directly with the serials librarians but often are excluded from being included on discussions, conferences, and events that allow the Specialist to see the larger picture of why the library is using a certain technology, programs, or implementing certain procedures. Attending the NASIG

Conference allowed me to see how other libraries are dealing with technological changes and the products and solutions that are being used to address these changes. Most important was being able to discuss these issues with other serials librarians, students and professionals at the conference and take these new things back to my own library.

- Of course. It's a great effort to support the Library formation in Mexican students. We're grateful for this award and giving us the chance to take participation with you in this great event.
- YES absolutely. NASIG helped solidify my interest in serials and gave me a much needed sense of camaraderie. It was an invigorating experience and I took all of the positive energy from NASIG home and used it to help move my institution forward.
- For the newcomers to the field of serials, attending a NASIG conference is the best possible way to get acquainted with serials librarians from across the nation. First, the conference is very well organized. The venue of choice was amazing and the organizers were extremely organized, effective, and helpful beyond expectations. Second, the keynote speakers talked about cutting edge subjects and innovative ideas and approaches shaping the serials sector at global level. The sessions were diverse and the ensuing discussions were informative and helpful for all who attended. Third, meeting and interacting with serials librarians from all over the country and from abroad was just one of the best ways to create new connections and make new friends. I am one of the Serials Specialist winners and I can say with absolute confidence that this was the most worthwhile experience I had as a paraprofessional librarian. This was the first chance to participate in a conference, and I couldn't have done it without the award. I benefited tremendously from the mentorship program, and I would like to give special thanks to Carol Ann Borchert for agreeing to be my mentor and for introducing me to so many wonderful people.
- Attending the NASIG conference was one of the most worthwhile experiences in my library career. I met dozens of people that I can now count on as colleagues, and have already benefited from the professional relationships with people who share my specific interests within library science. In addition, the conference taught me the value of professional development in a way that my library school education could not. I learned more in one week about the practical issues facing my

profession than in many entire courses at the School of Information.

- Absolutely. By speaking to others in the serials field, newcomers will be able to network, speak with librarians about current issues, and have someone to turn to if they ever need help.
- Yes, I definitely feel that it's worthwhile for newcomers to the field of serials and continuing resources to attend a NASIG conference. As a MLS student who has experience with serials, I've realized that there is so much potential inherent in following a serials career and I did not fully realize this until the NASIG conference. It's also a wonderful venue in which to network and to meet other serials professionals with whom to connect.
- It is absolutely worthwhile for newcomers to attend NASIG—the conference affords us the opportunity to meet other people who work with the same issues in different ways. The sessions are a great tool for engaging new or different technologies and practices, and everyone was so friendly that it was easy to chat with strangers.

How did attending the conference benefit you personally?

- I was able to have a uniquely serials-based perspective of libraries which, coming from a law library atmosphere, was very beneficial because most of our events are law-specific. As much of what I do as a serials specialist is interchangeable between disciplines, it was very refreshing to have a conference dedicated to the serials functions of a library.
- The experience to stay in contact with the experts in serials was helpful. The conference was an opportunity to share experiences and ideas about libraries in both countries.
- I was able to talk about many issues with other professionals and librarians. I also gained a sense of perspective, not only for my own situation but for the greater whole. And I made lots of new friends who will be invaluable in helping my career advance.
- On a personal level, the conference provided the best opportunity for me to meet and interact with people from across the country and abroad, to be mentored by a wonderful serials librarian, and to enjoy the city of St. Louis with new friends.
- The greatest personal benefit to me was in the networking opportunity. Much of this would not

have been possible without the mentoring program and the slightly embarrassing, but oh-so-effective, award winner ribbons. It let people know that I was new, and I was constantly being approached by individuals willing to share their wisdom and advice.

- Our library has recently been searching for a new link resolver—at the conference I was able to speak with people from other libraries and found out some pros/cons of the products we are considering. I would also feel comfortable contacting any NASIG member in the future.
- Personally, attending the conference made me look forward to becoming a professional librarian in general. I discovered that an environment full of hundreds of librarians gives off an exciting and creative energy and really made me look forward to future opportunities to surround myself with similar career-minded individuals.
- I met many wonderful, friendly people who were willing to tell their stories, to give advice, and to talk about how things are working in their libraries.

Did attending the conference influence your career plans? If so, how?

- No. I always knew I was going to go to library school.
- In my case, I choose to do a dissertation about bibliometrics, so I'll work in the Web of Science, analyzing the publication of mainstream titles. Basically serials.
- Yes, it made me realize that there is still a great amount of work to be done in serials and that we are working in one of the most dynamic times in library history. As is such, the sky is the limit and the problems we are facing now, are in need of creative and innovative solutions. That's a pretty exciting thought! So in short I guess I could say that NASIG made me realize that a career in serials could be a very exciting thing.
- Yes. I will become a serials librarian when I receive my MLIS (2013).
- The conference has inspired me to continue pursuing publication opportunities. I benefited so much from the presenters at the conference that I want to give back to the profession by sharing what I've learned as well.
- Attending did not influence my career plans—but it did make me realize that I had chosen a career that is perfect for me.

- In many ways, attending NASIG caused me to confirm my desire to work with e-resources in the future. Attending various sessions that touched on or focused on e-resource-related issues allowed me fully realize that there actually are many various positions out there that work with e-resources in different ways and also made me feel more confident that I'd be able to follow such a career path.
- Yes, it renewed my willingness to work with such smart and friendly people. I've found that people who work on serials are nearly always friendly and willing to share their experiences to the benefit of others.

What can NASIG and/or the Awards & Recognition Committee do to improve the NASIG Awards program?

- Hmm...not much, I don't think. I was very impressed with the hospitality, communication, and the awards recognition and program.
- Give the chance of participation to more Mexican students and provide opportunities for previous award winners to return to the conference.
- I have no suggestions.
- You are amazing! Keep doing the same great job in the future!
- The program is excellent. I only wish more people were aware of it. Advertising on SERIALST and other professional venues is great, but you should consider advertising through library schools. Many people who would benefit greatly from a conference like NASIG simply don't know about it yet.
- I am not sure if this is a requirement of winning an award, but it would be beneficial to all award winners to attend the Mentor/Mentee session at the start of the conference.
- Currently, I have no issues with the NASIG awards program.
- Nothing, I thought it was great!

What could NASIG and/or the Awards & Recognition Committee do to improve your conference experience?

- Nothing.
- It was excellent experience. I love NASIG.
- They did a great job and I have no suggestions.

- NASIG conference experience receives an A+ from me. I was very happy with the accommodations, with the speakers, with all the people I met!
- It's hard to say, because they did such a fantastic job! It might be nice to have a more social event for the award winners earlier in the conference. Maybe the breakfast on the last day could be moved to the first.
- Nothing! Loved every minute of it.
- Overall, my conference experience was phenomenal. While I enjoyed the first-timers reception, I think I would have preferred to meet the other award winners in a smaller, more structured environment...I would have liked more of an opportunity to further meet with them.
- I would have liked some scheduled time to chat with the other awards winners—we all sat together at the opening session, but having some organized time to network would have been helpful.

Do you have any other suggestions or comments?

Please tell us about them here.

- No more, thank you.
- Nope! Thank you so much!!
- Thank you, so much, for granting me the award and for giving me the opportunity to attend a NASIG conference...I plan on attending next year's conference and am looking forward to it already!

How/where did you learn about NASIG's awards?

- My co-workers and fellow serials librarians have been members in the past.

- By the call for applicant published in my school and the Asociación Mexicana de Bibliotecarios (AMBAC), in which a lot of my school professors are members.
- ERIL listserv, lib-license listserv, NASIG members
- One of my colleagues suggested that I apply for the award.
- My supervisor encouraged me to apply for the award. I also saw the posting on SERIALST.
- From my supervisor.
- I learned about the awards via SLIS' listserv.
- I saw it on a listserv.

Where should NASIG promote its awards?

- Keep doing in the same way. Works perfectly.
- Listservs, library schools
- Major library publications.
- I think it would be great if you tried to promote through library schools, especially for the student conference grant. Perhaps you could ask members to send the posting to their alma maters to be included in library school listservs and the like.
- Facebook, Twitter, serials blogs, forums, and emails.
- I think that promotion through LIS programs is definitely an effective promotion tactic, as students are constantly looking for ways to get more involved with their future careers and for financial help with their programs.
- My library school program has a forum where they post scholarship promotions—going straight to the library schools might be a good idea. Also, state library association lists.

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Pre-Conferences

Serials and RDA: An Ongoing Relationship

Judith A. Kuhagen, Policy and Standards Division, Library of Congress

Reported by Valerie Bross

Note that as of the workshop, we had not yet received notification from the national libraries of whether or not Resource Description & Access, or RDA, will be implemented by the national libraries.

How can one succinctly capture the essence of an eight-hour workshop on serials cataloging? Yes, this was chock-full of everything that characterizes the best cataloging training: well-organized, lively, thorough, and thoughtful. But having said that, what next?

Perhaps the easiest answer would be to point readers to the complete set of PowerPoint slides posted to the NASIG site and urge them to read. As those fortunate to hear Kuhagen in action know, the PowerPoint slides are great, but are no substitute for the person.

Another tack would be to paraphrase the workshop schedule. Here, too, the reporter is in luck: Ms. Kuhagen provided a clear schedule with a well-articulated abstract. According to the abstract, the workshop was intended to cover the “background and structure of RDA; access points for persons, families, and corporate bodies with new RDA elements for authority data; use of the RDA Toolkit; development of

national, consortium, and local policies; and consideration of possible changes in RDA affecting serials.” And yes, the workshop did exactly that.

But for those still not satisfied, what can I add that would give some idea of how privileged the audience felt to have this opportunity to learn from a master trainer?

First, here are a few words to allay possible fears. In general, we learned that we could successfully complete resource descriptions for serials and record-corresponding authority data. For those starting out, the “webliography” included in the workshop (document D3-4) and the table of LC RDA Core Elements for the US RDA Test (D5-9) introduce and lead a new RDA cataloger through the process. Much of the decision-making that guides our current serials cataloging will still be valid under RDA, including consideration of user tasks, modes of issuance, and major/minor changes.

Differences between RDA and current practices have been much publicized over the past year, both at ALA (e.g. Renette Davis) and through the ALCTS Webinars (e.g. Adam Schiff and Steve Shadle). Kuhagen reiterated some of these differences, but also highlighted additional ones.

She began by discussing the exclusion of “continuing resource” as a defined RDA term. The introduction of continuing resource in the 2002 revision of AACR2 provided a way to expand Chapter 12 to include a description of integrating resources. However, for RDA, the Joint Steering Committee decided to use the more specific terms “serial” and “integrating resource” to avoid a problem with finite integrating resources.

Catalogers encountering RDA bibliography records for serials in utilities such as OCLC will have noticed some obvious RDA characteristics, including:

- The addition to the 040 field of subfield \$e rda (with Leader/18 of "i" for ISBD-punctuated records).
- The spelling-out of standard cataloging abbreviations (such as "volumes").

- The replacement of the “general material designator” with new data elements of content (336), media (337), and carrier (338).

More subtle changes might also have been noticed. The RDA Test completed during fall 2010 revealed that RDA as written:

- Would not support provider-neutral or single-record approaches to e-serials.
- Would extend the appearance of personal-author serials beyond what serialists might consider reasonable.
- Could require, per RDA 17.8, for serial compilations (e.g., Best plays of ...), that the first item in the earliest volume receive an authorized access point.

Fortunately, these situations are being addressed through LC Policy Statements, Program for Cooperative Cataloging decisions, and requests for reconsideration by the Joint Steering Committee.

Perhaps of all the questions addressed, the most pertinent at this point is: Where are we now in RDA serials description and how should the conversation move forward? Here are some points to consider:

- The ALA Joint Steering Committee is beginning to address deferred issues, such as possible elimination of corporate authorship (see <http://www.rda-jsc.org/working2.html#sec-61>).
- The Program for Cooperative Cataloging is establishing three task groups to begin the process of developing best practices for cooperative creation, maintenance, and sharing of RDA records.
- Library of Congress will be addressing both general and specific issues related to serials. Examples include:
 - The use in RDA of the term notes where data elements might be more appropriate. (Serials catalogers will be reminded of the switch from 500 note fields to repeated 260 fields for changes in place of publication and publisher.)
 - Guidance on expression-level changes.
 - Instructions regarding copyright dates appearing on serial parts over time.

Accounting Techniques for Acquisition Librarians

Rachel Kirk, Walker Library, Middle Tennessee State

Reported by Lynn R. Shay

This workshop was designed to provide an overview of a number of accounting responsibilities for librarians, such as the reconciling of library accounts with the university’s (or other governing body’s) financial system, supplying data for the creation of the annual materials budget, and monitoring fund expenditures.

In today’s libraries, serials and electronic resources can account for more than 80 percent of the library materials budget. For many librarians, the knowledge needed for managing budgets has been acquired while on the job. Rachel Kirk, a former CPA, was able to bring that perspective to the workshop by helping explain some of basic accounting concepts necessary for good fiscal management of library funds.

The workshop began with a discussion of the differences between library serials purchasing and university purchasing. In contrast to the bulk supply buying of the university, libraries purchase many unique items and often pay before receiving. In addition to this, libraries place orders through their Integrated Library System (ILS) that are then processed through the institutional enterprise system like Banner or PeopleSoft. This discussion set the focus of the first part of the workshop –reconciliation of library funds with university payments.

Reconciliation is more than getting the library and university accounts to mirror each other. Kirk pointed to four questions that must be answered:

- On the library side who has responsibility for reconciliation of accounts?
- What access does that person need to both the ILS and the enterprise system?
- Who are the contacts in the university accounting departments that will help?
- What assumptions might the university accounting department be making about library costs?

During a live demonstration showing library expenditures in an enterprise system and the corresponding library fund spreadsheets, participants were able to compare how each library was performing this reconciliation and discuss strategies for working with the university accounting department. All agreed that most important was the development of a good relationship with someone in the university accounting department. Good communication about what the library purchases and how the university processes payments is the key.

The workshop also covered cost-benefit analysis and budgeting. Kirk presented the cost-benefit analysis of two databases and talked with the participants about quantifiable and non-quantifiable costs. She showed the group how she created her annual budget using data from the previous 3-4 years to estimate future costs.

The workshop included discussion and hands-on exercises that were valuable to the librarians and reaffirmed the need for continuing education to achieve good fiscal management of our collections.

Who Ya Gonna Call? Troubleshooting Strategies for E-Resources Access Problems

*Susan Davis, University of Buffalo;
Teresa Malinowski, California State University,
Fullerton;
Tina Currado, Taylor & Francis;
Eve Davis, EBSCO;
Dustin MacIver, EBSCO*

Reported by Valerie Bross

It's hard to imagine a better way to rev up for a NASIG conference than this colorful, sound-filled, highly-interactive, and thoroughly informative session. Upon entering Hilton Salon A, participants merged into a real life representation of the Information Superhighway—full of construction signs, caution tape, sudden stops, and unexpected route changes.

The guides through this world of surprises were suitably accoutered in hard hats and orange vests. They set the scene with a short skit before turning the stage over to...the participants! Through a series of four scenarios, we pooled our experiences in small groups, and then shared results as a group. After each session, the intrepid leaders shared technical information and their own perspectives.

The first scenario dealt with an e-journal that is still not available thirty days after the order was placed. The question posed was: Whose problem is it—the accounts payable office, the subscription agent, or the publisher? The participants' response: any of the above and still others.

The second scenario explored the challenges of troubleshooting off-campus access via a proxy server. End users expect to simply visit the library resource page, click on the resource link, enter their library id code, and voilà. Lovely when it works; but what about when access fails? If your library is fortunate enough to have a technical support guru like Dustin MacIver, no problem. With admirable clarity, he led us through some of the nuances of "max host errors" and resetting the "MaxVirtualHost" parameter.

The third scenario focused on OpenURLs and link resolvers. Libraries that have implemented access through link resolvers benefit from context-sensitive linking and enriched service menus. However, every advance in e-resource services has a cost. Some link-resolver problems (e.g. change of domain names) may be resolved locally; others (e.g. bad data in publisher data feeds) are more elusive.

The final scenario asked participants to consider three mini-problems related to e-journal access. These problems included changes in coverage (a.k.a. the case of the disappearing years), "404" errors, and acquisitions snafus (e.g. lapse in payment). After considering these common and frequently frustrating problems, Eve Davis offered excellent advice. "Remember," she said, "Journals are many; problems are few. Don't lose perspective."

To outline everything learned would not do justice to the effect of collaborating on answers to these questions; it would reduce this highly-engaging workshop to a one-dimensional outline. Instead, I will include just a sampling of the tips shared both by participants and by the facilitators on topics related to e-resources access and problem-solving.

Tips for those new to e-resources management:

- Create, document, and maintain checklists, tickler systems, and workflows for trouble-shooting.
- Share the documentation up and down your institution's "food chain."
- Use shared mailboxes to receive publisher/provider notifications, so that when your chief troubleshooter goes on vacation or retires, others will be able to help.
- Make sure your institutional contacts (sent to providers/publishers/vendors) are up-to-date.

Tips for ongoing self-education related to e-resources management:

- Use OCLC's EZProxy documentation: <http://www.oclc.org/ezproxy/support/default.htm>.
- Follow publisher transfer notifications at: <http://www.uksg.org/transfer>.
- Monitor NISO groups such as IOATA (Improving OpenURLs Through Analytics): <http://openurlquality.niso.org/>) and KBART (Knowledge Base And Related Tools): <http://www.niso.org/workrooms/kbart>.

Vision Sessions

Science Re-Imagined

Adam Bly, Seed Media Group

Reported by Jennifer Baxmeyer

The speaker for the first vision session was Adam Bly, founder and CEO of [Seed Media Group](#), a "diversified science, media, and technology company with the mission of raising global scientific literacy." The topic of Bly's presentation was "reimagining science"—his view of how science and the world are changing and what we

as information professionals can do to help bring about those changes. Reimagining science, Bly explained, includes how the public interacts with science, how scientists do science, and the place of science within the world at large. The catalyst for reimagining science is rooted in a conviction that science has the unique potential to improve the state of the world.

According to Bly, we are living in a time of extraordinary potential to uncover and see things that we have never seen before (e.g., Hubble Telescope photos)—things that give us a deeper sense of humility about our place in the world and the preciousness of the Earth, new ways of visualizing information, and new ways of seeing connections in the world. Today, science is also giving us the potential to manipulate life and nature. Not only are we seeing new things, we now have sophisticated technologies and capabilities to manipulate and synthesize life (e.g., synthetic cells and synthetic genomes) and to bring about transformations that have far reaching implications on energy, healthcare, and areas we haven't even imagined yet.

Bly suggests that as science is changing and the questions are giving birth to new disciplines and new moral and ethical frameworks, the world is also changing around science. Science is not a closed system anymore. It is permeable and influenced by the world around it. As we see the rise of science outside of the United States, Western societies, and the scientific "superpowers" that have dominated 20th century science, we see a culture of science that looks, on the surface, very similar to our own. This culture, however, is distinct from that which we have here in the United States or in Western societies. The approach of investigation, hypothesis generation, and to understanding the natural world differs in China or the Arab world, for example. According to Bly, these other cultures are now starting to reconnect with their scientific roots. As other cultures around the world start to recognize the potential science has to transform their economic development and spearhead major changes in society, this, too, will have a consequence on the culture of science. Not only will new advances and new technologies increase from countries we previously

didn't associate with robust output, but the culture of science—the way we think scientifically—could be impacted as well by the rise of scientific thinking.

Bly suggests that we live in a world that is more interconnected than ever before. He believes that in order to understand any single issue on the global agenda today we need to zoom out and see it in the context of the system. For example, to understand disease in a particular environment, we need to understand climate. To understand climate we need to understand energy. To understand energy we need to think about economic growth and our demands on the economy. To think about economic growth we need to think about population dynamics. To think about population dynamics, we need to think about disease factors. Every single thing is linked and we are able to see these connections more than any other time in history because we are more networked than before.

We also have an abundance of data at our disposal now. We are now producing more data each year than the “combined sum of all prior human history.” The amount of data we are now producing (the data coming from our use of the Internet, from electronic records, and through scientific undertakings) is producing, what Bly calls, “a moment of incredible opportunity.” As an example, Bly showed his own genome that he was able to acquire, explaining that we now have an abundance of data and can, at a personal level, take ownership of the data, navigate it and make decisions.

Bly believes that the library community needs to understand that without science literacy, we won't be able manage information or reap the benefits of it, and that it is our responsibility to educate society in new ways. The abundance of data available to us is also becoming the basis of a holistic, interdisciplinary science, allowing us to integrate a variety of data from different disciplines to create a new framework. We have the opportunity now to create new visual languages and interfaces that are rooted in a common pursuit of understanding. Our mission, according to Bly, is to recognize the unique potential of science to improve the state of the world but, in order for this to

happen, two major changes need to occur in the way that we think about and do science. We've traditionally thought of science literacy in terms of how many scientists we produce, but in order to navigate the new global science culture, we need to think of science literacy as the pursuit of seven billion scientifically literate people. In order to accomplish this we need to rethink what it means to be scientifically literate and how we educate people around the world to have scientific literacy.

Bly thinks we need a new philosophy of scientific literacy and new modes of engaging the world in science. Currently, science is recognized as a source of good in the world: it creates drugs and technologies, and has a positive economic impact on the world. The bigger idea, however, and the one that needs to drive this new philosophy of engagement and science literacy, is that science is not just about its output—it is a system of thought that can be applied to non-scientific problems. Although we have recently started to see science as a lens through which we can solve the world's problems, we need to create a strong culture of conversation about science. We need to create more tools to engage the world in this conversation, especially people who historically would have never engaged with science. One way to engage people is through culture and ideas, by exposing science to people around the world through projects that bring together scientists, artists, and humanists to talk about common problems. It is through associating science with ideas and art that we can introduce science in a more well-rounded fashion than the way we in which we are first exposed to science.

Another mode of engagement is art and design. Bly gave the example of Edwin Abbott's *Flatland* (1883) in which Abbott wrote about a two-dimensional universe that contemplated what it might be like to have a third dimension. Abbott wasn't a scientist but through this work of literature, he introduced ideas that are the cornerstone of a branch of theoretical physics today. Bly suggests that when we hear physicists cite Edwin Abbott as having best understood the notion of higher dimensional universes, we are led consider the role art

has played in advancing ideas that we claim are scientific. Bly believes we were once all scientists and that design is making us scientists again. We didn't grow up hating science but became haters of science later in life, as it became associated with exams or something to be memorized. Science became hard and inaccessible even though we once all employed the methodologies of science and had an innate curiosity about the world. We need to bring science and design together, and use design as a way to create prototypes, test things and be creative about problem solving (e.g., through game design).

The second change that needs to occur in order for us to recognize the unique potential of science to improve the state of the world is open science. We need to re-architect science for the 21st century and move away from the closed structure of science being dominated by a few companies, structures, and cultures. According to Bly, knowledge about the world, produced and funded by the world, should belong to the world. Science needs to be open in order for it to progress. We need to make scientific knowledge available to anyone who wants to interact with it.

In addition, we need to understand that every problem in the world is a system. Although the disciplines (e.g., biology, physics, or chemistry) were classified by people in order to understand the world, nature doesn't recognize these systems. The challenge, therefore, is to start seeing links between the disciplines. This, says Bly, is where we need to mobilize scientific inquiry. He says that 65% of scientists cite literature as having an influence on their science. Furthermore, 62% of scientists are involved in at least one international collaboration. Scientists, as individuals, care about the world they live in and can be mobilized to change their modes of inquiry but the problem, says Bly, is that the architecture used to organize information is no longer ideal. The entire community of publishers, librarians, scientists, and universities, is struggling with this problem. The research web today is disorganized, fragmented and inefficient. The good thing is that scientists aren't waiting for changes—they never have. The natural instinct of the scientist is tweak “just one

little thing,” because when are confronted with the pursuit of truth and the dogmatic pursuit of it, they innovate.

We need to agree on a common framework and common ideas in order to collectively mobilize all of the players in science toward some first principles to make open science scalable, sustainable, and simple. Bly gives five principles that he thinks can provide a scalable model of open science can exist. The first is what he calls the “digital core.” The problem is that the fundamental unit of science is analog. Everything is on paper: the information, the way it is published and cited, the funding, the collaboration that produces research, and so on. Everything that drives science and is an output of science needs to be re-imagined. We need a digital core that doesn't rely on paper as the sole fundamental unit of science. In addition, we need mandated free flow of information. Scientific information that's funded by the public must be available to the public immediately. Government must regulate information and we, as information providers, should not accept anything else. If we have funded science, we should be able to disseminate it immediately. Third, we need to reinvent models of peer review. The levels of peer review and the investment in peer review that substantiates the non-free flow of information should be subsidized. We should take peer review out of the hands of the publishers and put it in the hands of the public and regulate it with government and non-government bodies around the world. The fourth principle Bly suggests is open standards and interoperability. Finally, Bly says we need new ways of extracting knowledge from information and tracking impact and influence.

In closing, Bly summarized how we will know when the changes we are advocating and working hard to bring about have occurred, and that we have begun to think scientifically. First, science will become the norm and there will be no such thing as open access, open data or open science. Second, we will start tagging things as being closed (e.g., a closed dataset or a publication) rather than open. Third, we will start to solve society's problems with science not only as a tool or source of

output (e.g., drugs to make us live longer) but also as a lens. Finally, we will have nothing less than a 21st century “scientific renaissance.” Science has the unique potential to improve the state of world, but only if we integrate it into society, share it and guarantee that its architecture is open.

Publishing in Chains

Paul Duguid, UC Berkeley School of Information

Reported by Jennifer Baxmeyer

Paul Duguid, adjunct professor in the School of Information at University of California, Berkeley, and a research professor in the School of Business and Management at Queen Mary, University of London. He is also co-author, with John Seely Brown, of *The Social Life of Information* (2000), and has written articles on the history of trademarks and network supply chains.

We are used to seeing automobile brand wars—GM versus Chrysler, for example, and when we think of brand wars we also think of Coke versus Pepsi or Adidas versus Nike. In the 1990s, the digital companies began engaging in similar brand battles, but the interesting thing about these battles, according to Duguid, is that many times the brands are not just competing with each other—they are also working together. An Apple computer, for example, can run on an Intel processor, or Dell computers run Microsoft Windows. This means that, in essence, Apple and Intel aren’t really competitors and neither are Dell and Microsoft, even though it may appear at first glance that they are. Although the individual brands are competing to label the entire supply chain, the reality is that they must also cooperate and work together. Duguid suggests that there are missing links in the computer supply chain. A few companies have become very powerful and well-known while others have slipped down the chain in terms of name recognition, despite their importance. For instance, if Windows crashes, we know whom to contact, but if our hard disk crashes, most of us couldn’t say who manufactured it (e.g., Western Digital, Seagate, or Toshiba). This shows how a well-known brand name can completely obliterate all other names, regardless of

how important they are—without a hard disk, there is no computer. Another result is that, even though the hard disk manufacturers are key, their profit margins are significantly less than those of the well-known companies because those well-known companies control the entire chain, even though they don’t manufacture all of the different components that make up a computer.

Duguid explained that he originally began examining supply chains in relation to the wine industry. Until the late 19th century, it was the chiefly the name of the English retailer or the vendor in England whose name was on the bottle of wine and this is what determined whether or not someone purchased it. A shift came in the 1860s when taxes on French wines were removed, and the French chateaus, vineyards, and regions (e.g., Burgundy or Bordeaux) started becoming more well-known in England and the retailers became less important. Next, the English, after realizing they couldn’t compete with the French, decided to sell their wines by the varietal (e.g., Merlot, Pinot Noir, or Pinot Grigio) which obliterated all of the formerly important French brands. This demonstrates how power can move up and down the brand chain.

In terms of supply chains in publishing, Duguid gave an example from John Thompson’s *Merchants of Culture* (2010) of the publishing supply chain, showing that it begins with the author at one end and includes many other stages and players (e.g., publisher, printer, distributor, library wholesaler, and library) before the book reaches the reader, and what the reader sees may not necessarily be the name of the author. Duguid suggests that historically, book publishing hasn’t changed much but at different times, different players in the chain have been the significant name in selling the books. Across history, we can see different attempts by publishers to assert their importance (e.g., Allen Lane of Penguin Books). Branding is not only important in book publishing, however. Many magazines have taken advantage of branding by registering trademarks to protect their brands. Authors, too, have tried to brand their names by registering trademarks (e.g., Rudyard Kipling and Mark Twain) as a way to assert that

they would not let publishers and magazines have control of their names.

Duguid also gave an example of how the idea of competing and working together can even be seen within NASIG. He noted that on the NASIG website there are two statements expressing the nature of the organization: on one page, NASIG says it is for “all members of the serials community” while on another page it says that NASIG is for “all members of the serials information chain.” To Duguid, the word “community” implies that “we are all in this together” and we all have shared interests, while “information chain” has a different meaning—on one hand, we have things in common, but there are also many differences and divergences.

Duguid suggests that underlying the idea of branding is certification. For example, if we need an attorney, doctor, or engineer, we can be assured of their competence by their certification, that is, the diplomas or degrees they hold. The idea of certification can also be seen in the world of academia and academic publishing—it is the degree and the institution (i.e., the academic supply chain) that in one way or another validates, and gives us confidence in, that person. It is the institution telling us to trust the person because the institution does. It is someone in the academic supply chain that validates the person. He explained that the concept of certification and certification marks (i.e., trademarks) arose from trade unions, who said “this was made by union labor.” The idea of certification marks carried over to academic institutions as early as the 19th century when many schools, especially business schools (e.g., Stockton Business College and Fresno Business College), took out trademarks. Duguid believes that academic supply chains endure but also create tension because the institution conferring the degree is also the one taking the fees. Moreover, the institution gets paid regardless of whether or not students attend classes and get degrees. There really is no link between fees and rewards, which creates a problem in terms of certification of knowledge.

Duguid addressed the question of how brands appear. In general, a supply chain appears when a fairly well-settled means of taking goods to market starts to break down. He gave the example of IBM which, until the 1970s, made all parts of the computer and was dominant. Unfortunately, IBM became too secure in its position and failed to notice when the PC entered the market and other companies such as DEC, Sun, and Apple became suppliers, making it possible to own a computer labeled IBM that had a processor made by some other company. Another example of this type of disruption can be seen in the publishing supply chain. In England in the early 18th century, the Stationers’ Company ruled the entire industry because the government allowed the monopoly. When the monopoly broke up there was a battle between the booksellers and printers over who would control the chain. When the two groups realized the battle’s outcome was unclear, the printers decided they didn’t care who won as long as it wasn’t the booksellers, and the booksellers stated they didn’t care as long as it wasn’t the printers. They settled by giving control of the chain to the author.

Duguid says we can see the chain breaking down and new players coming to the front when we consider the Internet and the idea of open source and no longer needing the certification mark of the institution. The question becomes one of locating the brand—the authority—within the chain. The answer is complex and depends on the particular type of chain. The brand is rarely constant—it moves at different times, up or down the chain. For example, with books we generally treat the author as the mark, but sometimes we may choose a book based on the publisher or even how it is packaged (e.g., a Barnes & Noble Classic or a New York Review of Books Classic), even though we may not have heard of the author of that book. When we think of other genres, such as film and television, or newspapers and magazines, we find it more difficult to identify who is actually responsible for the intellectual content, even though these genres are not that much different than books. With movies, in particular, the brand wars are very obvious: Sony Pictures versus Columbia versus the production company versus the director versus the lead

actor, and so on. Duguid noted that it is also interesting to see the “invisible authors” in the academy—the researchers and other people who contribute to a work but get no credit unless a book does poorly. In addition to the breaking down of chains, we must also consider structural changes in chains. For example, when looking at some serial publications, we can see a shift from the serial being known solely by its name with no mention of who authored its articles to being judged based on the article authors and their credentials.

Duguid went on to discuss what happens in the world of shifting chains and marks when we move into the digital world. He suggests that there are two views: the idealist’s and the pragmatist’s. The idealist says that information wants to be free, while the pragmatist says it needs to be constrained. There are issues with both views, according to Duguid. When we have free information, we lose the idea of filtration, context, and certification, all of which are hard to reinstate. By the same token, many constraints can also be resources. For example, we can judge an article’s importance based on where and how it appears in a newspaper. The constraint imposed by the size of its headline, length, and placement are indicators of its importance. Duguid concluded by applying Oscar Wilde’s sentiment about the truth to the future, declaring the future “rarely pure and never simple.” Although the supply chain endures and continues to be worth attacking, the links within it are constantly changing and it is by understanding the nature of changes that we can prepare ourselves to move into the future.

Strategy Sessions

Leaving the Big Deal: Consequences and Next Steps

*Jonathan Nabe, Southern Illinois University Carbondale;
David Fowler, University of Oregon*

Reported by Heather Klusendorf

Big deals are commonly criticized among librarians. Typically, only twenty percent of content within a big

deal receives high usage; yet many librarians remain reluctant to leave big deals fearing negative consequences from publishers. Jonathan Nabe, Southern Illinois University Carbondale, and David Fowler, University of Oregon, shared their experience with canceling big deals and assured librarians in the audience that they won’t be “run out of town” after cutting big deals in favor of smaller title lists. In both libraries, budget cuts made it essential that the serials librarians pinpoint content to cancel. In both libraries, they targeted big deals in an effort to cut spending. In both instances, there were little to no negative consequences.

Nabe’s library at the University of Illinois Carbondale cancelled three big deals: Springer, Wiley and Elsevier. For each big deal, Nabe reviewed downloads to find that much of the content received one download per month or less. He suspected that the access need could be adequately filled by interlibrary loan (ILL) requests. In all cases, the library retained archival access, so only current year access was lost.

The library saved more than \$300,000 by cutting the big deals and moving to individual titles. While publishers did make leaving as painful as possible, the savings were worth it. Negotiations alleviated much of the pain, and Nabe’s library settled for a multi-year deal. He said, “Publishers make us offers we may not love, but cannot refuse.”

In the end, Nabe’s library was able to fulfill loss-of-access needs with ILL requests. Three faculty members complained about missing access to journals they relied on, but after reviewing usage with the librarians, all came to an understanding. The library was able to increase monograph spending as a result of the tactics taken to cut big deals.

Fowler’s library at the University of Oregon canceled one and a half big deals: Elsevier and Wiley. The library started with Elsevier and reviewed cost-per-use data to identify high-cost/low-use titles. They were in a consortium, so leaving that consortium did cause problems. In order to avoid problems, the library tried

creating a smaller buying group among some consortium members.

The smaller group of libraries tried to determine 90 percent of Elsevier use among the three schools. After approaching Elsevier with a new, smaller deal option, the publisher tried to deter collaboration by going to each school individually. The three schools held tight, seeking a combined cancellation of 18 percent across the board. Similar to Nabe's library, Fowler's library was able to settle with Elsevier by agreeing on a multi-year deal. By 2015, the library's spend will be at the same level as during the big deal.

Fowler says that ILL demand has increased dramatically, but Elsevier requests are only modest. There has been a moderate amount of concern among faculty in chemistry and physics, which remains to be resolved.

After the Elsevier battle, the collection managers were not ready to start again with Wiley. They were able to cut low use titles without much fight, retaining access to 90 percent of high use titles. They cancelled the big deal and reordered on a title-by-title basis. The library received no complaints from faculty after cutting the Wiley big deal. Fowler closed his presentation by saying that another cancellation project is inevitable within his library in the next five years.

Collaborating for Sustainable Scholarship: Models That Serve Librarians, Publishers, and Scholars

*Carol MacAdam, JSTOR;
Kate Duff, University of Chicago Press*

Reported by Diana Reid

JSTOR's Current Scholarship Program (CSP) is a new program for publishing current content launched in January 2011 with 174 journals from nineteen publishing partners. The University of Chicago Press (UCP) has a long-standing partnership with JSTOR as one of the original contributors to the JSTOR Archive in 1996, and UCP's participation in CSP (all titles were to be transferred) was seen by both parties as a natural evolution of this partnership. In this session Carol

MacAdam from JSTOR and Kate Duff from the University of Chicago Press shared their experiences with this transition.

MacAdam describes CSP as a "sea change" in the scholarly publishing industry. She states that university presses and other scholarly publishers not only need to have content online, but to deliver it in such a way that actively engages end users, or they risk losing that content to larger publishing houses capable of doing so.

Duff described the pressures UCP faced in contributing to the scholarly publishing community by delivering state-of-the-art publishing. Such innovation requires a continual investment in time, new technology, and training, all of which have costs attached. UCP receives no funding from their parent institution, so they must generate the income themselves. Especially in a recession, venturing into new markets or enticing new journals is not possible without the advancements in place that make such a transition worth a new customer's effort. UCP's commercial counterparts have deep pockets and they needed to scale up through partnerships in order to compete.

Enter JSTOR and the CSP. UCP can take advantage of the benefits of scale and have the new opportunity to focus on building up their portfolios. The partnership allows each to bring their expertise and create a mutually beneficial, hopefully sustainable publishing model.

The timeline was ambitious (about a year) and 2010 was a year of constant communication between often dispersed teams handling different aspects of this transition for UCP. The main hurdles along the way were identified as pricing, design, technical integration (the most challenging of all), and user support integration.

Pricing

Pricing changes are always difficult – you will always make someone pay more. This change was also happening during a recession. UCP agreed to adopt the community-based pricing model they had previously

implemented, instead of FTE. Single-seat licenses were done away with for the time being, as they are not industry standard or sustainable. JSTOR spent a lot of time modeling their existing customer base to achieve revenue neutrality. Twenty four percent of customer fees went down in cost, and thirty percent increased less than five percent. The most heavily impacted customers were contacted individually. To help to compensate for cost increases, the discount on the complete package was increased from twenty to forty percent. This turned out to be a good option for some customers who had lost content due to cancellations.

Design

Multiple layers of existing branding needed to be represented – JSTOR, UCP, societies, and journals. JSTOR aimed to retain the look and feel of publisher's content as it transferred to JSTOR, but they are unapologetically user-focused and needed to attenuate publisher demands to make sure content usability was of utmost importance. Also, room for peripheral content, such as news, announcements, advertising, and resources for different user groups was desired. The design needed to be scalable and flexible. Representatives of all parties participated in the design, which continues to be an ongoing process of compromise.

Biggest Hurdle: Technical Integration

UCP and JSTOR used a common platform (Atypon), but JSTOR ran a unique instance. This meant 50,000 articles and book reviews had to be migrated to the JSTOR platform. Issues to be resolved included overlapping content, identical DOIs, etc. JSTOR had to develop an entirely new model, accommodating real-time workflow from publishers, instead of post-publishing (JSTOR Archive) workflow. They now needed xml-based full-text to include multimedia, rapid release, ahead of print, and author proofing. All of these changes required heavy quality control – everyone became a quality control editor to identify as many bugs as possible.

User Support Integration

Integrating customer records was a huge challenge. JSTOR, CSP, and UCP had customer definition differences (e.g. are a customer's multiple sites considered satellite campuses, or are they one integrated site?). They needed to agree on who their customers are and how they are defined. They dealt repeatedly with the problem of multiple order numbers from UCP, JSTOR, and subscription agencies.

Next we heard some of what was learned over the busy past year. One of the challenges was maintaining some level of consistency in the service that customers were accustomed to from publishers (especially new customer bases for JSTOR, such as hospitals). For example, what the publisher might consider five sites or five subscriptions, JSTOR considered one (or this scenario might be reversed). UCP and JSTOR needed to negotiate in order to maintain economic viability for all involved parties, and in some cases JSTOR grandfathered in relationships that previously existed between publisher and customer, so as not to radically change subscriber models in ways that affected access.

JSTOR knows well that post-cancellation access is of utmost importance to libraries. Their publisher partners had many different policies about post-cancellation access and in some instances no policy. Participation in CSP allowed publishers to step into an important role that they may have been avoiding. JSTOR continues to work with partners to standardize license terms, with the goal of full transparency.

Relationships with subscription agents were completely new to JSTOR and required new processes and adaptations.

While it doesn't seem the most likely scenario, the biggest challenge ahead is that publishers could withdraw their content after the five-year license agreement expires. MacAdam pointed out to an audience member expressing concerns about this, that in the event a publisher left CSP, they would have to make their content available somewhere, so it isn't likely to disappear. This reporter would like to reiterate

CSP's attentiveness to the importance of license terms that address perpetual access, thereby eliminating the biggest concern (if not the smaller concern of the inconvenience of a potential change).

Many libraries said that they had "chosen not to participate;" however, this showed a common misunderstanding about what CSP is. JSTOR is very well known as the one place libraries trust for permanent, archival access. This expansion will bring about a required change in mentality for libraries as to the JSTOR brand.

Polishing the Crystal Ball: Using Historical Data to Project Serials Trends and Pricing

*Stephen Bosch, University of Arizona;
Heather Klusendorf, EBSCO Information Services*

Reported by Rob Van Rennes

Stephen Bosch from University of Arizona and Heather Klusendorf from EBSCO Information Services discussed the intricacies of the serials pricing studies utilized by librarians. Price indices for journals are used for the periodic measurement of price changes to show fluctuations of the market and aid in the projecting of future costs. Bosch explained that journal pricing information is based upon the ANSI/NISO Z39.20 standard- Criteria for Price Indexes for Print Library Materials.

Although the current studies are primarily based upon print serial prices, the presenters acknowledged that electronic publications are fast becoming the norm and will need to be addressed in the near future. Electronic journals pose additional complications, as standardized online pricing information is hard to determine, ultimately making it more difficult to predict future costs.

One of the two most common price studies for serials is "Prices of U.S. and Foreign Published Materials." The data originates from the Library Materials Price Index (LMPI) gathered by the Association for Library Collections and Technical Services (ALCTS), a sub-

division of the American Library Association (ALA). This publication was formerly known as the *Bowker Annual*, but is now published by Information Today in the *Library and Book Trade Almanac*. The second major pricing study is the popular, "Periodical Price Survey" produced annually in *Library Journal*.

When comparing the two most common studies, it is important to recognize that there are major differences in the methodologies used for gathering data, although the final conclusions are often in harmony. The *Library Journal* results are based on periodical price surveys, which encompass a broad set of sources. Some examples include the Institute for Scientific Information's Science Citation Index and EBSCO's Academic Search Premier Database. On the other hand, ALA ALCTS has typically used a periodicals price index that uses controlled information based on limited, but stable and consistent data. In this case, the figures are derived from a sample set of approximately 3,800 domestic print serial titles.

To make predictions for the *Library Journal's* price survey, the authors review related articles and trends throughout the year. The investigation includes monitoring a wide variety of economic indicators such as oil markets and exchange rates, but also involves discussions with publishers and other industry leaders. By design, the projections for future journal prices are generally conservative and err on the higher end of the cost scale, as it is far better for those managing serial budgets to have excess funds rather than shortages at the end of the fiscal year.

Regardless of the study, recent results indicate that library budgets are not currently in a recovery mode as some would believe, but are in fact are experiencing some of the most historically adverse times. Although inflation rates have diminished somewhat in recent years, they are once again beginning to trend upward. This situation, coupled with decreases in library funding, points to an inevitable serials crisis that will be detrimental to both publishers, who will see less revenue, and libraries, who will experience the loss of content for their users.

NISO's IOTA Initiative: Measuring the Quality of OpenURL Links

Rafal Kasprowski, Rice University

Reported by Barbara M. Pope

OpenURL linking multiplies a database's power by increasing visibility of the library's resources and making it easier for patrons to link to them. Libraries worldwide use OpenURL link resolvers to link to full text and print holdings records. They do sometimes fail to link to the appropriate copy, leaving library patrons frustrated. Rafal Kasprowski presented the efforts of the National Information Standards Organization (NISO) initiative, Improving OpenURL Through Analytics (IOTA), the major purpose of which is to improve linking quality by measuring the quality of links provided by content providers and making the data freely available. Using the data, vendors can compare their OpenURLs to other providers, spot problems, and improve linking.

IOTA is comprised of a group of librarians involved in electronic resources management and metadata as well as representatives from OpenURL and database vendors. The IOTA group was created in January 2010 in response to problems with OpenURL linking. The basic assumptions of the group were that:

- Results are achieved through an analytical investigation of how OpenURL works
- The OpenURL standard is not at issue, it is the links that are generated that need to be addressed
- Selective changes to OpenURLs will lead to significant improvements in linking.

The desired outcomes of IOTA were to produce quantitative reports that will help OpenURL providers compare OpenURLs and make improvements. In addition, libraries can compare OpenURL providers and adjust their OpenURL setup.

Before the advent of OpenURL, linking to full text content required proprietary linking from abstracting and indexing databases. This approach was limited, as libraries had to manually activate linking and few

abstract and full text databases participated in linking. Even with these disadvantages, the main advantage was the accuracy of the static links. Problems with proprietary URLs were also easy to trace and fix. The objective of OpenURL linking was to link to dynamically link to the full text in a way that is unrestrained by proprietary links. Because the full text of a journal may be available from several providers, the URL to access it may not be the same for all libraries. The information in a library's A to Z list indicates the "appropriate copy" for the library.

Kasprowski used an illustration of the OpenURL which indicates how complicated and problematic the linking process can be. The illustration shows the linking process beginning with the citation source, such as an abstract and indexing database; through the source OpenURL; then through the OpenURL resolver, which indicates the library's holdings, gives a target OpenURL, and sends the patron to the full text target. In essence, there are multiple places where problems could occur instead of a single place as with the proprietary URLs. While the linking process does have problems, an advantage is that OpenURL resolver vendors have taken over most of the linking setup and determined where to link to the full text. In addition, participation by abstracting & indexing and full text database providers has exceeded that of proprietary linking.

Kasprowski added that while OpenURL does work, there has been no improvement to it in the last ten years. Dynamic linking is less predictable, as the syntax links may change without notice. In addition, OpenURL links are often incomplete and inaccurate due to metadata problems from the vendor databases which cause linking to fail. The IOTA project intends to help improve OpenURL linking quality by spotting these problems. The methodology used for solving the problem is called quality metrics, in which IOTA "makes use of log files from various institutions and vendors to analyze element frequency and patterns contained within OpenURL strings." The quality metrics system developed by IOTA scores resources on these areas that affect linking and produces reports that give the users

of the system information to improve their OpenURL strings so that patrons can link to full text.

The scoring system came about after Adam Chandler conducted a 2008 study and the concept of a scoring system was discussed. The idea was to create a baseline for comparing OpenURLs from different content providers and develop a best practice. The problem analysis in Chandler's study was limited to the source link and does not take into account the target database URLs. A high score in the tool does not indicate successful linking, as linking can also be influenced by the knowledgebase, the OpenURL resolver, and the full text provider. Kasprowski added, however, that if there were also improvements made in target database URLs, we could see improvement in linking because the target databases would be configured to support incoming OpenURL compliant links.

There was a good question and answer session after the presentation. Among the issues discussed was whether libraries could use the reporting system to compare OpenURL linking in two databases, or perhaps the same database from different vendors.

Kaprowski's slides are available at <http://www.slideshare.net/rkaspro/iota-nasig-2011-measuring-the-quality-of-openurl-links>. The scoring tool and other information are at <http://www.openurlquality.org/>.

Shaping, Streamlining and Solidifying the Information Chain in Turbulent Times

*Jose Luis Andrade, Swets;
Meg Walker, Taylor & Francis;
Anne McKee, Greater Western Library Alliance*

Reported by Janet Arcand

Anne McKee discussed how the Greater Western Library Alliance (GWLA) is responding to leaner, meaner times. GWLA now uses Google Apps for its website and Basecamp as a project management tool. It has invoked SERU (Shared Electronic Resource Understanding),

saving on the time and cost of negotiating licenses. It is working on collection development initiatives such as GIST (Getting It Systems Toolkit) and a pilot project to allow members to view the orders of other members. GWLA's member ILL departments have used purchase on demand, or user-driven purchase, for years. E-journal package purchasing can be streamlined by ceasing reconciliation list work and just having new starts and transfers accepted into the package for no added cost during the license period; one library saved 40 hours of staff time in this way. Another trend is to renew existing agreements instead of negotiating new ones. GWLA is providing new services such as invoicing for packages and discounts on conference calling and hardware equipment. It also provides each member with an annual report on the cost avoidance that they achieved through GWLA.

Meg Walker of Taylor and Francis related that, although they usually use a John Cox license, negotiating changes is time-consuming and the company needs to better publicize their willingness to invoke SERU. They support using the Transfer Code of Practice to provide consistent guidelines that ensure accessible journal content to subscribers when journals transfer to new publishers. They also support OpenIdentify as a standardized method to identify institutions and streamline the renewal process. The Taylor and Francis website provides updates, subscription information, pricing, a librarian newsletter, and links for subscription activation, usage statistics, and customer service. They are migrating subscriber account information to their new platform which will have automatic redirects from Informaworld. The audience was encouraged to keep in touch with everyone in the subscription chain and to ask for extensions or license amendments when needed.

Jose Luis Andrade explained how Swets "shapes" their services, by providing tools and improving the delivery of information based on customer feedback. They have a forum for conversations with a mindset to listen, interact, react, and implement. They help libraries decrease workload, increase staff support, and maximize budget use. Swets services are designed to

appeal to patrons, enhance speed and searching, and to help the library market its services. Andrade sees Swets “streamlining” in its shifting from being an agent to being a full service information solutions provider, and leading the industry in standardization, integration, and innovation. It is currently working with publishers to launch the ICEDIS XML claiming standard, and supports standards such as ONIX-SPS and ONIX-SRN to improve communication accuracy. Swets is “solidifying” by retaining existing customers through its services and support, and by marketing to new customers who could gain the most from Swets services.

Gateway to Improving ERM System Deliverables: NISO’s ERM Data Standards and Best Practices Review

Bob McQuillan, Innovative Interfaces Inc.;
Deberah England, Wright State University (unable to
present);

Reported by Laura Secord

In response to ongoing challenges with electronic resources management (ERM) systems, NISO established the ERM Data Standards and Best Practices Review Working Group in 2009. Bob McQuillan, a member of the group, reported on the history leading up to the project, the process used to identify and analyze key elements, and results thus far. The project built on the work of the Digital Library Federation’s Electronic Resource Management Initiative (ERMI), which in 2004 published a report that included a “data dictionary,” considered key to the functionality and interoperability of ERM systems. The charge for the NISO project was to conduct a “gap analysis” of ERM-related data, standards, and best practices; review the ERMI Data Dictionary and map its elements to other relevant standards projects; and to consult with vendors and libraries using ERM systems and other stakeholders for additional feedback on data requirements, implementation, and standards.

The session identified some of the problem areas in ERM system development and implementation, including system implementation, workflow and

internal communication issues, problems with licensing and license tracking, issues for consortia services, cost-per-use data and resource evaluation, and the management of e-books. In an effort to analyze existing standards and best practices and map them to the ERMI Data Dictionary elements, the working group established four categories of standards and best practices: link resolvers and knowledge bases; the work, manifestations and access points; integration of usage and cost-related data; coding license terms and defining consensus; and data exchange using institutional identifiers. McQuillan presented an informative snapshot of twenty-three relevant standards and best practices (e.g. IOTA, CORE, SUSHI, COUNTER, ONIX, SERU), outlining the findings for each in terms of correspondence and overlap; comparing meanings and uses; and determination of whether the ERMI Data Dictionary should address the standard, or if the relevant standard (with revisions) is sufficient to address ERM needs.

For further information on the ERM Data Standards and Best Practices Review Working Group, go to <http://www.niso.org/workrooms/ermreview>.

Continuing Resources and the RDA Test

Regina Romano Reynolds, Library of Congress;
Diane Boehr, National Library of Medicine;
Tina Shrader, National Agricultural Library

Reported by Pattie Luokkanen

Regina Romano Reynolds from the Library of Congress, Diane Boehr from the National Library of Medicine, and Tina Shrader from the National Agricultural Library are all members of the U.S. RDA Test Coordinating Committee. Their presentation gave a thorough account of the careful test preparation and data collection done to perform the RDA Test on continuing resources. However, they began the presentation by letting us know that the decision regarding RDA will be announced just before ALA. We will have to be in suspense just a little bit longer.

To prepare for the test, a website was set up for communication with testers using the project management software, Basecamp. Testing materials were posted at the website. Testers were given free access to the RDA Toolkit during the test period. The range of materials had testers cataloging formats that they had never handled before. Eight surveys were developed using SurveyMonkey. Each time a cataloger created a record they had to fill out a survey. Surveys were also conducted to gather the opinion of library administrators. The findings of the test came from all of the surveys, as well as all of the test records. The mountain of data collected was a challenging amount of information to analyze. Much more was received than was expected -- 23,366 bibliographic and authority records and 8,509 surveys!

A divide-and-conquer strategy was used to deal with the amount of data collected. Their strategy was to create a benchmark RDA record. They created a core version and a core plus version. Charts were used to put together the information collected. Issues related to formats and modes of issuance were explored. They also looked at the time it took to create the records. They were able to consider the learning curve by comparing the difference in the amount of time it took to create a record from the first instance to the last per institution. A rich amount of data was received and the comment boxes on the survey were well-used.

The basic concept of a serial has not changed with RDA. The scope of what serials catalogers do is the same. Successive entry is here to stay. There are, however, some things that are new in RDA that were not done in AACR2. The group found that there are still questions to be answered; some community decisions are needed. There are areas that will generate confusion if we move to RDA, especially converting from AACR2 for continuing resources.

A question was raised at the end of the presentation regarding the amount of extra characters needed to type into the RDA records and the timing of this change coming when budget cuts are causing workloads to increase. The answer was that this was why a test was

conducted -- for evidenced-based decision making. A cost benefit analysis has been done and the take home message was, "Stay tuned!"

The Razor's Edge: Louisiana's State Budget and the Serials Crisis of 2010-2012

*Sara Zimmerman, LOUIS: the Louisiana Library Network;
Michael Matthews, Northwestern State University;
Karen Niemla, University of Louisiana at Monroe*

Reported by: Amy Carlson

Sara Zimmerman, the executive director of the Louisiana Library Network (LOUIS), began the presentation by describing the collaborative infrastructure of LOUIS. Established in 1992, LOUIS levels the playing field and allows the forty-seven partnering libraries to "do more with less," through sharing vital services such as library automation, authentication of resources, link resolver, metadata searching and interlibrary loan. The staff of LOUIS provides systems support, electronic resources negotiation, licensing, statistics, and billing for statewide purchases. LOUIS is a member-driven organization, but is tightly connected to the Louisiana Board of Regents. In June 2010, with significant turnover in the Board of Regents, the board eliminated LOUIS from the budget. Although a fraction of the funding was later reinstated, the seventy percent cut in funding two days prior to the 2010-2011 fiscal year meant the staff had to become creative to continue providing the basic infrastructure upon which the member libraries depended.

Michael Matthews of Northwestern State University continued the presentation by relating the troubled fiscal situation facing the state. With a return of between six and seven dollars for every seven dollars invested, LOUIS saved the state millions of dollars in cost avoidance, and yet the decision to cut LOUIS came from the Board of Regents simply because their budget was cut. The Regents were unaware of the workings of the collaborative infrastructure. Fiscal year 2011-2012 is a "cliff year." With federal stimulus monies drying up, an increase in the state's contribution to Medicaid,

various tax repeals, and the economic nightmare of the BP oil disaster, Louisiana faces a \$1.6 billion shortfall. Matthews delved deeper into the economic situation facing Louisiana, and the nation as a whole, showing the widening gap between what states pay out and what they take in as revenues. In this climate, higher education institutions, and in particular four-year schools, are under fire to fund their own enterprises. Not only does this treat education as a commodity, but many institutions are adopting business models, such as productivity measures and other assessments of faculty and curricula, for decision-making. Acquisitions of new materials, and paying for serials price increases in particular, forced many members' libraries to not renew subscriptions over the last few years, relying instead on shared purchases through LOUIS. Where LOUIS could once help alleviate some of the financial burden of inflationary increases facing member institutions through cooperative purchasing of electronic resources, now, the future is unknown. Matthews asked the group, at what point do you do less with less?

Karen Niemla concentrated on the process used to generate and utilize public support of LOUIS. She described the outreach marketing which they began to try to reverse their situation. They branded LOUIS on the login page, including a warning to patrons about budget cuts. This warning also instructed users that they could help by going to a website. This brought immediate visibility to LOUIS and to their services. Niemla made a cartoon about the crisis and posted it on YouTube, with contact information for Louisiana state legislators in the comment notes. Because the LOUIS website was meant for business and not for updating patrons on the ongoing crisis, Niemla acquired a domain name (savelouis.org) and hosting with her own funds, and built a website. She gave tips on this process, including developing a clean and useful design, providing links for patrons to connect with legislators and members of the Board of Regents, and collecting statistics from the hosting company regarding RSS feeds, views and emails sent. She strongly recommended taking social networking sites seriously in this process as a form of control over message and intent. For example, not allowing comments on the

social media page allows them to protect the organization from harmful comments. In the process of getting the message out about the budget cuts facing LOUIS, Niemla used a variety of social media avenues with a consistent message, easy instructions for "friends" to help, and frequent updates to keep people engaged in the process.

Tactics Sessions

A 10 Year Collaboration—Still Going Strong: Ulrich's and ISSN

*Laurie Kaplan, Serials Solutions;
Kara Killough, Serials Solutions*

Reported by: Amy Carlson

Kara Killough of Serials Solutions opened the presentation by introducing the partners, their roles, and their evolution over ten years of collaboration. The U.S. ISSN Center, formerly the NSDP, assigns ISSNs, creates metadata for OCLC and the Library of Congress Catalog, answers questions and requests, and works with metadata standards. R.R. Bowker was the original partner with the Library of Congress on the project. Laurie Kaplan described the relationship between the Ulrich's team, part of the original Bowker contract, and the current affiliation with Serials Solutions under the Cambridge Information Group. The Ulrich's team creates the metadata for the Ulrich's Periodical Database, which feeds both the print and online Ulrich's products, as well as provides metadata for sister companies such as ProQuest and Serials Solutions. A shared employee located at the U.S. ISSN Center provides a vital data collection relationship between the two partners, and over the course of four years, the position evolved with its four employees.

The shared employee's responsibilities reflect both the commonalities and dissimilarities between his two employers. On the Library of Congress side, Eric, who is currently in the position, assigns ISSN, creates serials records using CONSER rules, looks for titles of interest such as niche or unusual subscriptions for the Ulrich's

team, follows up on prepublication assignments, and solves problems. On the Ulrich's side, he creates records for the Ulrich's database, adds data fields unique to Ulrich's, such as peer review status and subscription information, and fills in data gaps. He also provides MARC/AACR2 expertise, creates authority records, normalizes records, and helps solve problems. Kaplan and Killough highlighted the metadata commonalities between the two partners, as both the U.S. ISSN Center and Ulrich's have a history of standardization and normalization of serials titles through the ISSN.

A contractual agreement between the two partners details the intricacies of bringing together a governmental agency and a for-profit enterprise. Library of Congress provides a workspace, tools, training for ISSN work, and library standards. Serials Solutions trains the employee in Ulrich's and Serials Solutions processes, supplies access to their databases, and manages the position.

Many parties benefit from this partnership. For U.S. publishers, it's a one-time application to obtain an ISSN and create an entry in the Ulrich's database. At the same time, the metadata is recorded in OCLC WorldCat and the Library of Congress catalog. For the U.S. ISSN Center, they have a dedicated person who frees up their staff to work on other projects, as well as a liaison between the publishing industry and the U.S. ISSN Center. Serials Solutions benefits from the partnership by having a rich source of metadata, pre-publication information, and the added ability to track down niche or rare serials. In addition, the partnership increases the authoritative ISSNs for Serials Solutions' database and exposes Serials Solutions to Library of Congress metadata standards, including subject headings. The benefits to the library community include ISSNs for worldwide use, greater follow-up with publishers for pre-publication ISSN assignments, completion of pre-publication records and more problems resolved between libraries, publishers, aggregators and digitizers.

Some of the challenges facing the shared employee reflect the difference between the two partners. The project requires re-keying data into two different computers due to security issues. The two partners strive for converging rather than parallel data paths and Eric, the current employee, transfers more information electronically between the two systems than previous people. There is a slight difference in cataloging practice, especially regarding subjects and publications in multiple formats. Two supervisors, one remote and one on-site, manage the position, increasing the potential for differences in ideas and management styles. Also, there are different work policies between a governmental agency and a company. Ultimately, the U.S. ISSN Center, Ulrich's database, and Serials Solutions use many of the same data elements, and both partners strive to enhance the metadata in records used by researchers.

The successful collaboration shows that a public-private partnership can succeed. Some of the reasons for this success include metadata and library standards, which facilitate communication, interoperability and partnerships. The collaboration itself will assist the two partners through the RDA/Bibliographic Framework Transition Initiative. Because serials are high-maintenance in general, this partnership creates a way to share the common data elements between the two partners, allowing them to concentrate on adding data to their unique fields. Future directions for collaboration reflect the immediate and long term changes and opportunities with each partner, such as exploring linked data with Library of Congress, transferring data between the two systems electronically, preparing for RDA, contextualizing metadata, and moving beyond serials.

The audience members asked about where publishers can go to report changes in titles or title ownership, how the two agencies handle serials title changes, and how to report incorrect coverage data on the Serials Solutions record.

Using Drupal to Track Licenses and Organize Database Information

Amanda Yesilbas, Florida Center for Library Automation

Reported by Esta M Day

As libraries focus more of their budgets on electronic resources, properly managing these resources becomes increasingly important. A number of proprietary and free ERM systems have been developed specifically to manage the lack of holdings, vendor, and licensing information that comes with each electronic resource. Although these products offer one solution to the problem of managing large amounts of inter-related and sensitive data, they are not the only answer. In this session, Amanda Yesilbas of the Florida Center for Library Automation (FCLA) described how she used Drupal, a content management system, to track and store vendor, licensing, and usage information for FCLA's electronic resources.

Yesilbas first discovered Drupal when she used it to design the FCLA website. She noted that Drupal was easy to use and accessible even to someone who had never designed a website. Additionally, the system offers varying levels of user permissions, which is ideal for the FCLA because it handles e-resource licensing for eleven state universities. Drupal's robust searching and organizational capabilities are ideal for the types of relational data that is typical with e-resources. Also, because Drupal is open source, it is completely customizable.

After discussing some of the benefits of Drupal, Yesilbas gave a demo of her Drupal database. The demo explored some of the functionalities and capabilities of her ERM. Because Drupal's interface is web-based, the database appears as a webpage. Licensing information is organized by vendor, publisher, or resource. Licensing terms are entered by using a drop-down menu, and permission levels are set so that only certain users see certain types of information. Additionally, a calendar visually displays important events, such as license renewals.

Data is organized into records that only require one-time population. For example, if a journal is published by Oxford and purchased from EBSCO, the process might be as follows: a specific journal record would be created, a vendor record for EBSCO and a publisher record for Oxford would be created, and these records would be linked to the journal record. If the EBSCO or Oxford records already existed, they would simply need to be linked to the journal record; once created, the data in these records does not need to be re-entered with each new record.

The FCLA Drupal-based ERM system offers one more way for information professionals to manage their electronic resources. Although the system is not pre-loaded and pre-packaged like proprietary ERM systems, it is fully customizable and its capabilities are worth investigating for some organizations.

Using Assessment to Make Difficult Choices in Cutting Periodicals

*Mary Ann Trail, Richard Stockton College of New Jersey;
Kerry Chang FitzGibbon, Richard Stockton College of
New Jersey*

Reported by Anne F. Rasmussen

This talk was co-presented by the Coordinator of Library Education and the Serials Librarian at Richard Stockton College of New Jersey. Their focus centered around two aspects of this project; Trail addressed history, culture, and communication at their institution, while Chang FitzGibbon outlined their project's objectives, procedures, and outcomes.

Trail began her presentation by discussing significant changes in their library. Comparing holdings from 1990 to 2011, Trail detailed the vast increase in electronic resources at their library. Escalating journal costs, a decrease in the library budget, and new college programs increased the complexity and amount of budgetary constraints. In addition to this, the faculty's relationship with librarians was tenuous prior to the periodical cut project. The support of the faculty was important to the library, but how was the library to

increase positive relations while cutting \$29,000 from the budget? With a new library director focused on data-driven decisions, librarians and staff worked to make the necessary cuts while overcoming an uneasy relationship with faculty through communication, clear objectives and procedures.

Chang FitzGibbon outlined the objectives of the periodicals assessment project, the process to achieve the objectives, and the outcomes. The objectives included: addressing a \$29,000 budget deficit; verifying overlap in the electronic accessibility of print titles in databases already purchased by their library; proactively communicating with the faculty by demonstrating no loss of access with print cancellations; and ensuring stability and access of electronic resources.

Chang FitzGibbon's focus was to identify low-use current print subscriptions to which the library also had current electronic access, and then target these titles for cancellation. All electronic access was considered in this project, including titles accessible through aggregators. Using their link resolver and a spreadsheet, Chang FitzGibbon generated an overlap analysis report, then exported and merged multiple files to create one large file containing titles of all journal holdings (in all formats) in their library. Any database limitation, such as an embargo, was noted in these files. With this spreadsheet, it was clear to see which current print titles were accessible electronically through subscribed databases, e-journal collections and aggregators. Usage statistics were collected, and online stability was examined for these current print titles. Current print titles with low usage and with stable electronic counterparts were submitted to the library director to be considered for cancellation. The director then submitted recommendations to a campus-wide committee for consideration. Faculty had the opportunity to question choices before final decisions were made.

The result of this project was a successful target cut in the budget with no loss of access to current titles. Because the faculty was involved in this process, the

faculty not only accepted these cuts, but also became the library's strongest ally, expressing interest in asking university administration for additional library funding. Showing transparency in the process and communicating throughout the project, the library demonstrated to faculty they were working for the best possible outcome for the entire campus.

Exploring Patron Driven Access Models for E-Journals and E-Books

*Erin Silva Fisher, University of Nevada, Reno;
Lisa Kurt, University of Nevada, Reno*

Reported by Rob Van Rennes

Erin Silva Fisher, Document Delivery and E-Resources Librarian, began the presentation by highlighting the benefits and challenges for libraries in relationship to some of the new pay-per-view services being offered by publishers. According to Fisher the attractiveness of the pay-per-view models stems primarily from the financial savings of eliminating the acquisition of unneeded and low use materials while seamlessly fulfilling the informational needs of users.

When embarking on a new pay-per-view model, there are a variety of considerations for librarians to keep in mind when tailoring the program to their specific library. Among the attributes to scrutinize are customization and viability, level of mediation, stability of the model, security to prevent abuse of the system, and scalability to fit the requirements of the individual institution. All of these elements play a part in determining whether the services will be successful.

At the University of Nevada, Reno (UNR), a pilot project was initiated for pay-per-view and ultimately abandoned after it was deemed to be too labor-intensive. Despite the discontinuation of the project, Fisher explained that it was a worthwhile learning experience. The models will evolve over time; when UNR is ready to test pay-per-view again, the staff will be more prepared to evaluate the services. Although these budding models have strayed from traditional library services, Fisher stated that they keep libraries relevant

and viable. Her advice to other librarians was to get involved in the process and work with publishers on innovative models, as it's the only way to improve future services.

Lisa Kurt, Head of E-Resources and Acquisitions Services, continued the presentation by discussing the new models of patron-driven acquisitions (PDA) of e-books. As with pay-per-view, the variety of options and vendors create a myriad of choices for librarians considering PDA services. It's important to know whether short-term loans or outright purchases are desirable, the library's preference for mediated or unmediated purchases, and the strengths and weaknesses of the providers in terms of content, interfaces, and services.

Benefits of a PDA program include purchasing only the content that is being used, providing an enhanced user experience with superior access, and saving physical space by acquiring electronic sources as opposed to print materials. However, there are challenges for libraries, and one of the most troubling problems is bibliographic records. The quality of some records is less than ideal, and the appearance of duplicate records in library catalogs may occur if proper precautions are not taken. Without restrictive parameters, it's also possible to spend funds at a faster rate than anticipated and purchase materials that the library wouldn't otherwise consider.

Kurt concluded that there are many lessons to be learned, and encouraged the audience to work with new PDA models. It's important to collaborate with colleagues and publishers, ask questions, start small if there are concerns, and remember that nothing is permanent, so libraries shouldn't be afraid to experiment.



One Academic Library – One Year of Web Scale Discovery

Tonia Graves, Old Dominion University

Reported by Virginia A. Rumph

Tonia Graves presented Old Dominion University (ODU) Libraries' experiences during the first year of implementing a web discovery product. Her talk focused on four efforts: reconsidering the role of the ILS; website redesign; planning for mobile services; and implementing WorldCat Local. ODU has used Innovative's ILS since 1995, and in 2010 the librarians requested an audit to ensure that the library was using the Millennium ILS to its full potential. The audit recommendations included making better use of fixed field codes, consolidation of vendors and vendor records, using electronic materials selection, and editing and redesigning the fund code structure. Re-indexing was also recommended to add needed fields and subfields, as well as statistical category tables. As the result of a reorganization that was occurring at the same time, an Innovative Steering Team was created to make recommendations on policies, new products, and fundamental changes to the use of the ILS. It proved very important to get the ILS in good shape before WorldCat Local was implemented.

In 2008 a Web Electronic Services Team was formed to redesign the ODU Libraries' website. As a result, WorldCat Local was added as the main single search box, as well as a link to the ODU catalog, a site index, a feedback link, separate links to resources for faculty, graduate students, and distance students, plus tabbed navigation. Since the launch, there have been the following changes: "ownership" of pages has been assigned for ongoing revisions; templates have been updated; functional titles were added to the staff directory; Google Analytics was implemented; and usability testing has begun. Streamlining the site's updating process still needs to be completed.

Creating the mobile website is a work in progress. However, the mobile site includes links to the library's

hours, a floor map, catalog, mobile article databases, a “Contact us” link, library news, as well as an iPhone/iPod/iPad app to download.

In January 2010, WorldCat Local (WCL) was implemented as ODU’s web scale discovery tool, with Friends of the Library providing funding for the first two years. Offering WCL fulfills the library’s goal of simplifying access to library resources through a single search box. Since the launch, the usage reports creation process has been refined, the contract was renewed, and mobile access has been implemented. Staff training still needs to be done, as well as the addition of more databases to the advanced search, and establishing “ownership” of specific areas of WCL. Unfortunately, there was a lack of communication, and no staff input in choosing WCL. The Reference staff resisted using it, or incorporating it in teaching. On the positive side, patrons use it, with usage reports showing that the lowest point on the graph for 2011 is higher than the highest point for 2010. The satisfaction of users seems to be causing reluctant library staff to come around, so the overall picture is definitely positive.

Through the Gateway: Reporting on Collections

Sandy Hurd, Innovative Interfaces, Inc.;
Tina Feick, Harrassowitz;
John Smith, American University Washington College of Law

Reported by Amy Carlson

Tina Feick asked the audience to pretend: that a new provost arrives on your campus and asks for as much data as possible; that your institution offers early retirement incentives, and five of your ten senior staff members opt for the early buyout; that your director decides to leave with no succession planning, and you must plan for a fifteen percent budget cut over the next two years with an unknown percentage each year. You have thirty days to plan, and you need data. While the scenario may seem over the top, similar events happen regularly throughout the library world. Having a plan in place and a known methodology for acquiring your data

will give you an advantage, both for everyday decisions and in times of change.

The presentation provided insight into the data organizing process from three different perspectives: the ILS vendor, the subscription agent, and the library. Development begins with a few steps: start with internal discussions and brainstorming. Create a business case that ranges from one sentence to several pages, answering the question, “I wish I had this because...” Sketch out a first version, or 1.0 feature list, and begin to code it. Development progresses through a series of iterative processes, which include market research, brainstorming, talking to customers or stakeholders, and working with beta testers to receive feedback in order to start the process again.

Subscription agents come up with new ways to report, either through specific requests or from brainstorming. They need to address if this is a one-time or ongoing report, whether or not they already have an existing report, or if this is a new kind of data collection. Also, they need to identify another partner who can help with collecting this data. By looking at the business case, or what you need, and when and why, some of these questions can be easily answered.

In the past, communication and data exchange flowed between the library, intermediaries (agents, jobbers, consortia), and content providers (publishers, aggregators) in a triangle. Now, with many more partners and combinations possible, the triangle changes shape and the relationships between these various entities look more like a Venn diagram. The overlapping spaces between the partners emerge as the cooperation needed to produce the necessary information. Making it work between all of the partners means custom development every time, even with standards in place. One thing to remember is that reporting exposes data and may require clean up. You must determine how much cleanup you will do and if your vendor can help. Decision making, as part of this process, includes the problems you must solve, the problems you want to solve, the statistics you need, and the time you have to complete the work. When

requesting reports, clearly define what you “need” in a business case and give the scenario to the sales or customer services representative, who may know of a better solution than the report you are requesting. Providing feedback helps the entire development process—not just for the library, but for the vendor as well.

Agents offer a variety of standard reports with many data elements. Renewal lists, price comparisons, price increase reports, and subscription management information all provide vital data. They can also provide other kinds of data to help make collection development decisions, such as budget information, subject analysis, publisher package and licensing information, and usage statistics. Trends in reporting include: tools for reporting statistics; separate, robust data stores; and trends analysis or transactional data. Tools that provide this data should be easy to use and web-based with unlimited access. No one wants to rekey this information between systems in order to achieve this kind of statistical and trends reporting, so the data must flow in an integrated system, or between servers, in order to achieve this. Currently, many of the systems act as separate silos of data, and the presenters encouraged us to ask vendors for more standardized data exchange.

John Smith provided a specific case study at the Pence Law Library. Through use of the “Reporter” module as part of their ILS, they were able to very quickly determine trends in circulation over a period of time. By having this information so readily available, they can be more confident in making decisions regarding collection development, such as the shift from print to electronic resources. When they looked at their data, they found that six of the top ten circulating items were not books, but service items, such as laptops and headphones. He recommended that the audience check data often. He also suggested that libraries should lobby their vendors and other partners to assist in periodically collected data, such as ARL statistics, in order to work together to solve common problems. The timeliness of data and the ability to easily manipulate it enables the library to move forward logically,

predictably, and transparently. Smith reminded the group that students and faculty want to know how the library spends their money, not just the institutional administration.

In conclusion, they suggested that libraries have data located in systems. By working together with the information from their vendors or partners, this information need could be realized through a utility to easily exchange data and to create reports. One of the most important parts of the process is determining your business case, or what you need, and when and why.

Questions from the session included access to reporting data at Pence Law Library, and Pence Law Library’s “Reporter” module. Many audience members commented on the need for more help with presenting information or visualizing statistics for their administrations, or for a standardized list of terms between partners to facilitate communicating to administrators.

New Life to Old Serials: Digitizing Back Volumes

Wendy Robertson, University of Iowa

Reported by Virginia A. Rumph

As more and more of our patrons access materials online, it is in the library’s interest to make as much of our content accessible to as wide an audience as possible. Wendy Robertson, Digital Resources Librarian, gave a primer on the many considerations that should be addressed when starting a digitization project. For instance, is the material under copyright, or in the case of a serial, are some of the issues in the public domain? There are many websites that can be used to help answer that question. Has the title already been digitized? Check the DFL/OCLC Registry of Digital Masters to find out. Does the digitized serial have gaps that your collection could fill? Before beginning, assess your priorities, as well as any financial or other constraints. Whenever possible, enlist partners to digitize the entire run of a serial. Using an item’s condition as the main criteria for scanning will result in an online collection with gaps. The primary motive for

digitization could be preservation, or improved access. Standards and best practices for the presentation of digital materials are widely available online. As an example of a well-planned naming standard, University of Iowa uses a unique number for each serial with an added number for each volume/year/issue to keep all the issues together for effective searching and retrieval.

It is crucial to think about how the material will be used. Retrieval is impeded when serial content is presented as a bound unit instead of as individual pieces related to other pieces. Various considerations must be taken into account in creating PDFs. Use the best Optical Character Recognition (OCR) you can afford to achieve the highest quality results. Also, consider accessibility, including mobile users. The default OCR option gives unsatisfactory results, whereas Clearscan is easily readable. Tags and soft hyphens make a difference, too. The way serial issues display varies widely from platform to platform. Robertson showed examples of the good, bad, and ugly ways serials are presented in digital collections. Google Books and Project Gutenberg are examples in which display can be problematic. However, HathiTrust seems to do a much better job of presenting content. Illustrations are especially error prone online. Robertson reemphasized the importance of breaking the material down to its smallest logical reading unit, such as the article or chapter level. Also, ensure that the PDF can be cited in isolation. She recommended requesting an ISSN if the serial doesn't already have one. Do not forget to make provision for title changes. Will all the title changes be easily findable, or will previous titles be hidden behind the latest title entry? If at all possible, become involved in your organization's digitization effort to bring a much-needed serials perspective to the endeavor. See http://ir.uiowa.edu/lib_pubs/78/ for links to many examples from the presentation.

Gateway to Good Negotiation: From Computer Mediated Communication to Playing Hardball

*Beth Ashmore, Samford University Library;
Jill Grogg, University of Alabama;
Sara E. Morris, University of Kansas*

Reported by Laura Secord

Negotiation is a skill needed by every librarian, whether you're negotiating a new license agreement, working on collection development, or hammering out the details for a new initiative with a faculty member or community organization. This engaging session highlighted the basics of negotiation from its roots in communication theory, as well as some of the specifics of negotiation preparation and technique. The first section of the presentation focused on communication theory and its role in negotiation. It was noted that in any situation involving negotiation, you must determine what kind of communication you're dealing with, analyze and interpret the "noise" that may affect your message getting across, and apply a feedback loop to mitigate or eliminate the noise.

The second part of the session emphasized the importance of preparation prior to negotiation. The presenter noted that one key to good negotiation is listening to the experts. Preparation is essential. Do your homework and know who you're talking to—find out as much as you can about both the vendor and the individual you'll be negotiating with. Session participants were also encouraged to take the time prior to negotiation to "know thyself," learning as much as you can about your own organization and its resources, policies, past license practices, limitations, needs, and so forth. Be willing to walk away and know what your bottom line is. The presenters advised listeners to let go of the idea of winning vs. losing and instead to look for options for mutual gain.

The final section of the presentation explored the advantages and disadvantages of several factors that may affect the ability to negotiate, including consortia, economic downturn, publisher consolidation and the Big Deal, open access, and technology.

The presenters have written a three-article series, "The Art of Negotiation," that appeared in the 2009 volume of *Searcher: The Magazine for Database Professionals*.

On Beyond E-Journals: Integrating E-books, Streaming Video, and Digital Collections at the HELIN Library Consortium

*Martha Rice Sanders, HELIN Consortium;
Bob McQuillan, Innovative Interfaces, Inc.*

Reported by Diana Reid

The HELIN Library Consortium is comprised of twenty-four libraries, including ten academic and fourteen special libraries. Most of these libraries are in Rhode Island, with one consortium member in Washington, D.C. and one in Massachusetts. The libraries have a shared Innovative Interfaces ILS, although there are two instances since Brown University maintains its own.

Sanders began with a brief overview of the decision-making process at HELIN. There is a board of directors, consisting of the directors of each academic library. The executive director leads the board and sets out the strategic agenda, which the board accomplishes through the work of committees, task forces and the like.

For 2011, the strategic agenda directed the board to pursue cooperative purchase and licensing of e-content, investigate centralization of technical services, pursue "single search box" or discovery options, evaluate the current ILS, and identify professional development opportunities.

The 2011 strategic agenda was driven in large part by changes in collection development trends, from individual acquisitions to purchasing and providing access to bundled collections of e-materials; first e-

journals, then e-books, and now heading into streaming content. Collecting bundled e-content, especially in newer formats, means libraries are acquiring items they would not necessarily have chosen with a more traditional collection development model. E-books now are where e-journals were about 8 years ago. More recently, the addition of streaming content (e.g. image and sound, from Alexander Street Press) is stretching boundaries and the limits of traditional processes even further.

Next we learned more about HELIN's approach to managing bibliographic records with the aim of truly integrating diverse e-content types and print materials using the Encore discovery tool. HELIN follows the Program for Cooperative Cataloging (PCC) provider-neutral record guidelines. For e-journals, HELIN subscribes to Serials Solutions MARC records. In the past, HELIN used a dual-record approach for cataloging e-journals, creating separate records for print and electronic versions of the same item; in large part this was done because not every library in the consortium had access to the same titles. Since they had been using separate records for print and e-journals, all they had to do was to create a list of their e-journal records and then delete them after the initial upload of Serials Solutions MARC records, which now require one monthly de-duplicated batch file to maintain. The ERM generates separate holdings displays that are customized for each library, and libraries can further customize the presentation of other ERM data they may want to display.

For e-books, HELIN anticipates that they will use bibliographic records from Serials Solutions, which has not started yet because they have decided that all their e-book records should come from one provider. They have many vendor-supplied bibliographic records, and they do not outsource cataloging of collections with fewer than 100 titles; these are cataloged in-house using OCLC or SkyRiver. All records come through one central office to be sure that they meet minimum bibliographic standards set by the consortium. If a provider won't make changes, Sanders uses MarcEdit to make them herself.

The next part of the presentation focused on Encore, the discovery tool central to HELIN's approach to integrating electronic and print materials. Encore is designed to expose digital content across all formats. Data harvesting that uses the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) is done in advance of a search, and data from external sources is indexed locally, which allows for a faster search. Harvesting promotes use of all collections whether they are in MARC or XML-based metadata schemes. The user does not need to know what kind of resources they want, what the library owns, or how the library organizes. They can easily manipulate search results with facets, with Sanders commenting that HELIN's experience has been that patrons don't realize that they are searching "everything," and more robust tools are needed to narrow search results. Bob McQuillan talked about community tagging as an untapped methodology for organizations. Tagging can expose partially described content, which can then be found and used.

HELIN bought Encore in a package with their ERM (Millennium). They saw an advantage to having a familiar platform, as they had been using Innovative's OPAC. Encore also offers facets for enhanced selection, such as a search refining tool, harvested content, and context-sensitive linking. As of May 2011, journal articles are included in search results; Synergy, which harvests article content, was added to Encore, but this is difficult to manage because not all libraries have access to all titles. Since articles are frequently desired by users, search results have a separate tab for Top Results in Articles, rather than being returned individually ranked with all other search results. Users can mouse over the article title to see article metadata before deciding whether to click through to the database.

At this point Sanders posed a question to the audience as food for thought: When you are able to incorporate journal articles for most of your licensed content into search results in the catalog, how important do the journals themselves remain?

In search results, the tag cloud replaces traditional subject headings; the first part of the cloud gives the most popular tags/subjects, but one can access a long list of every subject heading in the retrieved records, which can be beneficial for drilling down to a more granular search. HELIN has most recently incorporated material icons with specific designations—sound, text, video, maps, web resources, and print—where the catalog formerly used print, e-govdoc, and web resource for all other electronic formats. This summer, they will split electronic material types further into e-books, e-journals, e-maps, e-videos, and streaming music websites. With Encore, HELIN's digital repository content, which consists of eight bepress Digital Commons repositories, is now exposed through one common platform. The collections include digitized historical papers, unusual collections such as the collection of restaurant menus at Johnson & Wales University, and electronic theses and dissertations. Again, all types of content types are unified in the search results.

Lastly, McQuillan shared an example of Encore and Content Pro, another Innovative product, in use at a public library. The West Bloomfield Township Public Library uses Content Pro to organize their digital collections, and Encore to harvest and expose the metadata. It is a work in progress, currently consisting of eighteen collections, with a different one highlighted each month for patrons. Part of what motivated the creation of this repository was the Greater West Bloomfield Historical Society, which had a tremendous amount of materials that it wanted to capture for public use. They also created a centralized collection with information about their sister library, also using Content Pro. All of this cuts down on use of web pages, which are simply not accessible unless browsed. Also included are librarian book reviews, both audio and video, and lots of encouragement to have patrons contribute their own content. For example, staff members were given Flip video cameras in order to sit with patrons and do impromptu book reviews as part of the summer reading club.

Using ESPReSSO to Streamline SSO Access

*Andy Ingham, University of North Carolina, Chapel Hill;
Dustin MacIver, EBSCO Information Services*

Reported by Esta M Day

This two-part session addressed single sign-on (SSO) technology from the viewpoints of NISO's SSO Working Group, which aims to develop recommended practices for SSO, and EBSCO, a vendor of electronic resources and related products.

Andy Ingham, of the UNC-Chapel Hill University Libraries and a member of the SSO Working Group, began the session with an overview of the current state of SSO authentication. Ingham noted that content providers and libraries currently face a number of authentication challenges, such as accurately connecting a user with the appropriate institutional license, connecting users that find the resource via the open web and allowing unauthenticated users (such as walk-ins) to access resources. The SSO Working Group was created to address these and other SSO issues.

For those of us who do not have an understanding of the inner workings of authentication technology, Ingham gave a detailed overview of the differences between a proxy-based authentication environment and a SAML (Security Assertion Markup Language) Shibboleth-based system. As a proponent of SSO, he focused on the advantages of SSO over proxy, such as the elimination of IP range management for both libraries and content providers and the use of SSO for other institutional resources.

The SSO Working Group's goals include standardizing terminology for SSO products, describing "use cases" that demonstrate the various ways in which users find sources and authenticate, developing recommendations for best practices for the relationships between members of the SSO community, standardizing elements and practices in the use and implementation of SSO and ultimately developing a course of action to implement these practices in the online community.

On the vendor end of SSO, Dustin MacIver, of EBSCO, discussed the implementation of SSO in EBSCOhost, EBSCO A-to-Z, and EBSCO A-to-Z with LinkSource. His presentation focused on the capabilities of SSO in EBSCO products, noting that various levels (group, profile and database) and mixed authentication are available. Organizations also have the ability to set up Shibboleth authentication through EBSCOadmin.

Additionally, MacIver noted a few important considerations for potential SSO users. Currently, not all full-text resources accommodate SSO, which means that some other form of authentication will be necessary for these resources. Additionally, because certain SSO technologies are still in the early stages of development, there are some limitations on their stability, operability and security.

Managing E-Book Acquisitions: The Coordination of "P" and "E" Publication Dates

*Sarah Forzetting, Coutts;
Gabrielle Wiersma, University of Colorado at Boulder*

Reported by Pattie Luokkanen

The University of Colorado at Boulder (CU-Boulder) Libraries has developed an integrated approval plan for e-books and print books using the vendor, Coutts. Gabrielle Wiersma reported that e-books are becoming the preferred format for many reasons. As the University of Colorado at Boulder faces a decreasing budget and stacks space, e-books have a certain appeal. E-books are available 24/7 for multiple simultaneous users. They also can't be lost or stolen, and are great for distance learners and off-campus faculty to use.

CU-Boulder has been building e-book collections for over ten years. They were one of the first libraries to participate in patron-driven acquisitions with NetLibrary. More recently, they have begun using Coutts, which uses the MyiLibrary platform to supply e-books. They just completed a patron-driven acquisitions pilot with Coutts and MyiLibrary in select subject areas. In working with Coutts, they planned to streamline the selection and acquisition process for

print and electronic books to ultimately save time and money. This includes selection and acquisition of front list materials and meeting the needs of thirty bibliographers, as well as preventing duplicate orders and sharing access to e-books in a multi-library system. Coutts can send e-books to the library through an approval plan or through Patron Select.

CU-Boulder uses the approval plan and Patron Select. They decided that adding e-books to their existing print approval plan offered many solutions and a high level of customization. Their approval plan allows selectors to review the lists of titles that match their profile. Approval profiles are rule sets, based on instructions from the library that are generally based on bibliographic data, but can also be set on pricing, book type, readership, and so on. After a thirty day review period, Coutts will send any books that haven't been rejected through the online ordering system. The library makes the final decision on whether to acquire the book or not. With Patron Select, the library patron selects a book; Coutts still matches it to an approval profile, but doesn't wait for the library to approve. They send MARC records to be loaded into the library's OPAC but the content is not invoiced until the patrons have actually used it. Patron Select access appears seamless to the patron for e-books.

The biggest challenge faced in setting up their ordering profile with Coutts was not knowing if an e-book would be available and whether the print or electronic copy would come first. Embargo periods imposed by publishers on aggregator platforms also cause problems for e-book availability. Print editions are often available before the e-book equivalent, so they end up purchasing a print copy despite preferring the electronic version. However, there is good news for this problem because the average delay between print and electronic has decreased over time. Since 2008, they have seen it change from a 185-day delay to a 21-day delay on average. Coutts has helped CU-Boulder come up with some innovative solutions to acquire e-books as the preferred format.

Sarah Forzetting from Coutts explained that Coutts has created a process where print book profile matches are funneled to an "On Hold for Alternate Edition" shelf. If the e-book format becomes available within a certain time frame, they send the e-book and cancel the print order; if no "e," they send "p". This process maximizes the possibility of receiving the electronic format. The library still has the option to stop waiting for the e-book and accept the print immediately, if they wish.

Wiersma reports that integrating e-books into their approval plan has really helped streamline workflow for selectors, acquisitions, and cataloging staff. Catalogers have been happy with the content and quality of the MARC records received from Coutts. They add a 956 field to the record with a "MyiLibrary" note to keep track of their MyiLibrary e-books in their ILS. The workflow for their Patron Select e-books is different because they can access them almost immediately, but don't have to pay for them until they have been used two or more times. Cataloging receives a weekly email regarding new Patron Select titles and adds a 956 "MyiLibrary PDA." Invoices are sent monthly to acquisitions for the Patron Select titles that have triggered a purchase. Cataloging updates the 956 field to "MyiLibrary PDA Purchased."

CU-Boulder will continue to evaluate their collections and improve profiles to ensure that they are building a well-rounded collection. The purchased Patron Select titles are monitored for usage and fit with collection development criteria. ILL requests are checked for patterns of book requests that are on hold for alternate editions through Coutts. They also wish to collect more formal feedback from users about their book format preferences, and they will keep making adjustments as needed.

Humble PIE-J and What is ISO 8?

*Bob Boissy, Springer Publishing;
Regina Reynolds, ISSN Center*

Reported by Mary E. Bailey

The PIE-J Working Group is charged with coming up with a set of recommended practices for the presentation and identification of e-journals. The goal of the working group is to review the problem of e-journals not using previous titles or ISSNs to identify the information found online, and to develop a recommended practice that will provide guidance, particularly in title presentation, accurate use of the ISSN, and citation practices, to publishers and platform providers, as well as to solve some long-standing concerns of serials librarians. These really are guidelines, not a standard, so some discretion is allowed. Bob Boissy pointed out that what is really wanted is simple: clarity and consistency for online journals and articles, the journal name on every page, consistency across formats that would require the use of the same title on all versions, and use of the original title and ISSN for previous titles. Citations are the primary way of finding an article, and it would be really helpful if the publisher or platform did not confound the problem by not leaving off the necessary information.

Citations are of primary concern when the online site does not indicate that there was a previous title. If there is no previous title given, users construct new citations with wrong information, and older citations will not get users to the correct articles. Articles are hidden because users don't realize that older titles are available on these websites. Link resolvers and catalog records can't be accurate if the website is not accurate. PIE-J supports using all titles with links between to show title history and relationships. JSTOR is a great example of a site that does this well.

So what is ISO 8 and why is it included in this discussion? Regina Reynolds explains that the ISO (International Organization for Standardization) documented the rules intended to enable editors and publishers to present periodicals in a form which will facilitate their use. These rules help editors and publishers bring order and clarity to their own work. Some may go against certain artistic, technical, or advertising considerations, but the ISO believes clarity is important. The problem with ISO 8 is that it was written in 1977, and does not provide any guidelines for

electronic serials. By combining the task of the PIE-J working group and the review of the ISO 8, the elements of PIE-J could be incorporated in the revised ISO 8. It would also be possible to get the word out to more publishers and editors. Every new journal and every new journal format require a new ISSN, so it would be possible to target all of these editors and publishers with the new PIE-J information at the same time as updating them on the ISO 8 standards. Reynolds would like to see a symbol developed that would indicate whether an online journal is PIE-J compliant or ask publishers to sign on with PIE-J. By working together, she feels that both groups would benefit as would all serial users.

Preparing for New Degree Plans: Finding the Essential Journal Titles in an Interdisciplinary World

Ellen Safley, University of Texas at Dallas

Reported by Pattie Luokkanen

Dr. Ellen Safley is the Director of Libraries at the University of Texas at Dallas, and is also responsible for collection development. The library is doing rather well budget wise; however, the university has been going through a series of changes. They have a new university president with a focus on the reworking of the curriculum using an interdisciplinary approach. There have been many schools and programs renamed, with some programs combined and others split into separate areas. They have experienced an eighty-three percent growth in degree programs in the past ten years.

Safley described the process for getting a new degree approved for a public university in Texas. This process includes a library component, which requires a statement from the library director with an evaluation of the collection and costs of acquisitions for the first several years of the new degree. This library component is a quite detailed evaluation of the monographic and serial collections, and others as appropriate. They want to know if the library subscribes to the core journals in the discipline, how they compare to other universities

who already offer the degree, and the number of titles in the specific subject versus the number of journals in a particular field.

There are many resources to consider, such as WorldCat Collection Analysis, reference works, periodical index lists, internet journal resources, Ulrich's, and *Serials Directory*; a list of journal articles produced by current faculty members is also reviewed, and ILL requests are useful as well. ILLiad has a statistical component to determine requests by journal title, date, and requestor. Statistics from SFX, journal citation reports, and impact factor are considered. Ellen admitted that she also uses Google. By searching Google, you can find the top titles in a specific subject and links to blogs, though information may be outdated.

The work continues during the first three years of the new degree, where fine-tuning occurs based on usage data, ILL requests, faculty suggestions, and link resolver data. This fine-tuning involves the elimination of titles due to lack of use.

This presentation was detailed and informative, and concluded with some helpful advice. The tactics used to select new titles in this process can also be reverse-engineered to cut titles. It is important to include assessment in everything that you do, and statistics can be useful when communicating with your administrators. Interdisciplinary is interesting, but not easy!

Trialing Mobile and Article Rental Access Options for E-Journal Content

Grace Baynes, Nature Publishing Group

Reported by Heather Klusendorf

Grace Baynes, corporate public relations, Nature Publishing Group, explained that Nature is experimenting with new ways to provide affordable, quick options for access to online research. These experiments include trialing article rental options and

taking the first steps toward offering mobile options to customers.

Why Experiment?

Most libraries—more than 4,000—that subscribe to *Nature* have site license access, so the publisher first looked to making pieces of content more discoverable to those who do not have site access. As a first step, Nature worked with DeepDyve to offer online article rentals. Users could purchase access to an article for twenty-four hours for \$3.99. Users cannot save, download or print the article; they must read the content online.

The publisher put five journals with an archive back to 2008 on DeepDyve in mid-December 2010. The thought was that increasing access options to article content would be positive; however, Nature found “the take up to be low.” There were fewer than fifty rentals per month, with the high research month of March seeing forty-five rentals. This was surprising, given that the typical download rate of Nature content exceeds 2.2 million downloads per month.

Why Was Rental Traffic So Low?

Nature examined the reasons why rental numbers were so low, including the fact that many of the users who want access to *Nature* simply already have it through a site license. Additionally, users may be unfamiliar with the DeepDyve platform. Linking from an article page to the rental options on DeepDyve could have been more prominent. Considering that there is a two-week lag between content being published online at *Nature's* site, versus when it is available on the DeepDyve platform, users may be obtaining the article for purchase from the *Nature* site before it is available for rental on DeepDyve.

Audience members suggested that the rental fee of \$3.99 may be too high for a simple rental. Librarians in the audience also suggested that the inability to save and download the article when rented may deter customers, but it is still very early in the trial to make

complete conclusions. Nature is continuing to work with DeepDyve to trial their article rental process.

Why Go Mobile?

It's no surprise that mobile use is trending up. Baynes showed the audience slides that indicate the hours per day users spend on their smartphones, including 4.5 hours per day on average for iPhone users. Smartphone use has grown forty percent in 2011, and will continue to trend upwards. Tablet use and sales continue to grow, with tablet sales estimated to surpass PC sales by 2015. Nature surveyed students at Texas A&M to find that there is still a large cohort of people not using smartphones, indicating future growth potential. Nature launched their free iPhone app in February 2010; they made *Nature News* available, which is also freely available on the *Nature* website. In September 2010, the publisher introduced mobile subscriptions. In January 2011, they introduced their iPad app. While revenue has been slow for subscription sales, it is growing, with the largest growth in the iPad market.

What Are the Challenges to Offering Mobile?

There are so many different mobile platforms needed for various smartphones that keeping up with development can be challenging. Changes can occur much faster in the mobile environment, which makes it difficult to support mobile access. Authentication for site license is difficult to manage, and lack of usage for libraries is a problem, since COUNTER is not available.

For 2011, Nature is moving away from the app offering in order to offer mobile website options. Hopefully, this will solve the mobile support problem. Nature will continue to experiment with new ways to deliver content, including a Flipboard app, licensed pay-per-view, and deposit accounts. Stay tuned.

Inventing the Can Opener: Getting the Most Out of Discovery

*Rice Majors, University of Colorado at Boulder;
John McCullough, Innovative Interfaces, Inc.*

Reported by Mary E. Bailey

Rice Majors began his presentation with reasons why his university chose to purchase and implement both the federated search ResearchPro and the discovery tool Encore at the same time: their databases were only available on a topics-based list, there was no article integration, and they had a strong desire to improve their services. Some of their initial challenges included how slow the federated search was and the limited number of databases it could search (thirty). Yet the usage statistics indicated that students were using this option. By implementing Encore they overcame the speed problem, provided faceted data and relevance ranking. Majors also pointed out that in most discovery systems, the article and book results are mixed together, but Encore keeps them separate and he feels this is good.

Chinook Library will be beta testing the next version. Chinook Libraries is beta testing the next version of Encore and doing usability studies. Majors indicated that from past usability studies the students (both undergrads and graduates) are already very comfortable with Encore and ResearchPro, but he is not as sure about the faculty.

The challenges that remain are acceptance of the product by the reference staff, some of whom will not teach it to the students. The library will also be doing more promotions, and plans to use two search boxes, one for the new search and one that will take users to the classic search.

John McCullough, of Innovative Interfaces (III), shared his perspective on decisions that libraries need to make. His first point was that they are pitching their product to users who want different features than librarians want. Discovery tools are meant to be a single search, where the product is clean and Google-like in

appearance, without the tag clouds. Users have learned that the right side of the screen (in other web products) has advertising, so I removed important items from the right side. What were tags in previous designs are now facets on the left side. Facets are helpful when users type in the same starting term, but their research needs are different. Facets allow them to easily go in different directions.

McCullough also spoke about how the containers are disappearing, that we see the articles, without the

context of the journal. He did not suggest a way to change this or provide the missing context.

So what does all this mean for the future? According to McCullough, the future is in finding the users, not bringing them to the library, but being where they are on mobile devices and social networks, or using feeds to push out what we have through Twitter and Facebook.

Profiles

Steve Shadle, NASIG President

Susan Davis, Profiles Editor

Steve is currently the Serials Access Librarian at the University of Washington Libraries in Seattle. He already responded to some questions about being a new board member in the previous *Newsletter* (<http://digitalcommons.usu.edu/nasig/vol26/iss2/38/>); however, as incoming President, he is certainly entitled to a more in depth profile on other aspects of his life!

How did you end up becoming a librarian?

My becoming a librarian was a foregone conclusion. I was always a bookish kid who was encouraged to read (my undiagnosed nearsightedness at an early age probably contributed to that bookishness). Weekly visits to the public library and summer reading programs were formative experiences. I worked at public libraries while in college and after graduating from the University of Washington (with a BA in Linguistics...now there's a degree that makes you a hot commodity on the job market!), the librarians I worked for at King County Library encouraged me to consider becoming a librarian.

I also admit to having the cataloger gene. My maternal uncle (who I most resemble of my family members) was a cataloger at Cal-Tech (and if Elliott were still alive, he would be appalled by the quality of cataloging copy in OCLC). I also come from a line of preacher/teachers on my mom's side of the family and my mom has become a

dance teacher in her later life, so I've got the genetic material for not only being a cataloger, but also a teacher.

Did you have a previous career or any jobs before you became a librarian?

Nope, no previous career. The only jobs I've had outside of libraries were part-time college jobs flipping burgers at a local Spokane drive-in and teaching school kids to folk dance.

[Editor note: We have something in common—I worked at a burger joint (large national chain without the arches) one summer!]

Have you always lived in the Pacific Northwest?

Mostly. I was born and raised in Spokane and moved to Seattle when I was 20. After library school, I lived in the Washington, DC area for about 3 ½ years and in Albany, NY for about a year before returning to Seattle. When I was 22, I rented a row house in a north London suburb for about 4 months, doing door-to-door market research to pay the rent.

Steve, you indicated in the May 2011 profile that you enjoy traveling. What are your favorite travel destinations and why?

They're so predictable and cliché. I like big cities in general, the energy, the culture, the people-watching.

J'adore Paris (anytime except summer). I get to use my college French (even though when I open my mouth Parisians wince and miraculously remember how to speak English). Even with the dog poop, Paris is an amazingly beautiful city. Lucy Wadham's recent book *The Secret Life of France* provided me with a better sense of the French psyche and why they are so interesting to watch (and so beautiful to boot).

[Editor note: Steve, as a former French major who has been to Paris 3 times and would totally agree that it has a certain *je ne sais quoi* that is distinctly Parisian; I'm inspired to give this book a try!]

Steve continues with his travelogue.

Oktoberfest in Munich. Germans are the ultimate rule followers, so seeing Germans being silly is just enjoyable for me. You haven't lived until you've been in a beer tent full of adults, all doing the chicken dance and hitting each other with squeaking plastic hammers. Plus the countryside of the Bavarian and Tyrolean mountains just puts my heart at ease.

Washington, DC in the spring when the city is in bloom and the wealth of free museums and culture is not yet overrun by tourists and school groups. Plus, I get to visit with some of my dearest friends.

Road trips along the West Coast (any place where I can be near water, hear/feel the ocean, watch the sun set...like I said, really cliché). One of my favorite souvenirs is a glass float I made at a glass art studio in Lincoln City, Oregon.

...and the guilty pleasure that most of my friends know about, my love of a Disney theme park. Where else do you get to be a kid again and where everyone is treated as a "guest" by "cast members" who appear extremely interested in making sure you enjoy yourself? I have very few items on my bucket list, but one is to visit all 11 theme parks worldwide.

Tell us more about your musical talents. When did you start playing the clarinet? We want to know more about your Balkan group.

Music was a big part of my life. Starting with clarinet and piano when I was 8 years old (the uncle I mentioned earlier was a very talented pianist and bought our family a spinet so I could learn piano). At church, I sang with and accompanied the youth choir and played in the hand bell choir. I played clarinet and alto sax in high school concert band and in a number of small ensembles.



When I moved to Seattle, I learned about Balkan music, dance and culture from performing with the *Radost Folk Ensemble* off and on for about 8 years. Towards the end of that time, the ensemble was in need of musicians, so a small group of us formed a band that was the genesis for the group I now play in: *Orkestar RTW* (RTW stands for *Radio-Televizije Wallingford*; Wallingford is the Seattle neighborhood where our accordion player lived at the time). The name is taken from a tradition of naming radio/television station house bands in the Balkans (e.g., *Orkestar Radio-Televizije Sofia*), similar to the *BBC Symphony* or the *NBC Orchestra*.

We're a five piece band: accordion, clarinet, tambura, electric bass, drums with the tambura player and I doing vocals. We play mostly Bulgarian and Macedonian music that was popular with the American folk dance community during the 1960s & 1970s as well as more recent popular songs and styles from the broader Balkan region (including Albania, Bosnia, Greece and Serbia). We have a regular gig at a local Greek

restaurant and play for the local recreational folk dance communities.

What other interests/hobbies to do you have, such as favorite authors, movies, dinner companion of choice?

I do so little recreational reading these days (mostly on planes) and what I do is either related to travel/cultural (like Lucy Wadham's recent book) or escapist fantasy. I managed to read all of the Harry Potters on flights to Hawaii and California last fall. I enjoy the wordplay of Piers Anthony and my favorite series is *Incarnations of Immortality*. As part of my Disney obsession, I went through everything I could get my hands on a couple years ago on the history and development of Walt Disney Imagineering and the theme parks. Bus reading is typically *The New York Times*.

My favorite dinner companion is my partner of 15 years, Rick. Unfortunately, his taste in movies is strictly comedies and musicals ("If I want stress in my life, I'll just talk to one of my children.") So when I do see movies, they are typically of the Pixar variety. We have a friend who hosts an Academy Awards party every year and the only year we decided to be informed voters was the year of *Slingblade*, *The English Patient*, and *Fargo*. Never again.

As for other hobbies, I waste an obscene amount of time playing *Civilization 5*. And we regularly babysit Rick's two grandsons (ages 6 and 8).

Since I have to seriously bend my neck to look up at him when I'm talking to Steve in person I thought I'd ask him what it's like being the tallest NASIG member?

☺

Is that true? Never really thought about it.

[Editor note: Now there's an idea for a fun thread on NASIG-L—who is the tallest member and who is the shortest?]

Last question and this is a serious one. Do you have any special goals or themes you plan to focus on during your NASIG presidency?

We need to increase the value of a NASIG membership. Historically, the primary benefits have been a reduced rate for conference registration, discussion list and newsletter subscriptions, and access to resources on the website. In the last two years, we've negotiated a reduced member rate for *Serials Librarian* (in which the conference proceedings are published) and have worked with NISO and others to provide reduced registration rates for serials-related continuing education. I would like to see us do more to offer services to members that don't attend the conference. One idea I would like us to explore this year is to take the "best of the best" content from the conference and make that content available in other forums, possibly as regional workshops or as webinars.

I asked Steve if there was anything else he'd care to share that hasn't been covered elsewhere. He thought I probably already had plenty of material to fill the profile, so I'll just end with a personal observation that Steve has a great sense of humor and is incredibly approachable, even if I have to look up when I talk to him. Have a great year as NASIG President!

Eve Davis

Susan Davis, Profiles Editor

Eve is account services manager at EBSCO's Midwest Office, but is better known as "Eve from EBSCO." She has worked at EBSCO for about 18 years, and serves customers in Ohio and southern Indiana. Eve retires in November, and if you've ever talked with Eve you know she has had a fascinating career and is a very unique person. I spoke with her one afternoon and hope that this profile will at least give a flavor of the delightful and amusing stories she shared about herself. Reading about Eve is not the same as talking to Eve, believe me. One question I didn't even have to ask, because I already knew the answer, was that her favorite color is PINK!

Before I begin the story of Eve, I do need to let you know that we are not related. Eve's roots trace back to Lithuania and Russia, while my Davis ancestors came from Wales.

Eve was born and raised in Toledo, Ohio; so she is a native Buckeye. I knew that buckeyes were some sort of fruit or nut, and Eve explained they are a fruit that is said to look like the eye of a buck. Buckeye candy is all the rage in Ohio, but I have yet to have the pleasure of sampling some. She received her bachelor's degree from Mary Manse College, an all-women's college (now defunct—more on that later), where, under the tutelage of some special nuns in the Ursuline order (Ursulines of the Roman Union), she learned all about the social graces which later became one of Eve's signature schtick. She remembers serving tea to Sister Rose Margaret, which was a very special privilege at Mary Manse. One significant fact that Eve learned about tea is that one sits to pour tea, but stands to pour coffee. Another nun, Sister Mary Lawrence, became best friends with Eve's mother. Mary Manse was a wonderful place with a real sense of community. Eve was much happier there than at a large state school. She was even president of her senior class—already cultivating that take-charge attitude!

History degree in hand, Eve spent two years in Israel on a kibbutz, when Syria decided to stage a surprise attack and blew up the kibbutz (1973). Eve's plans changed and she was able to find a job in the Toledo Lucas County Library System as a paraprofessional young adult librarian—and she was not that far removed from young adulthood herself! After about 18 months, Eve decided this was the career for her and went on to library school. Smart move, Eve!

I know I don't have all the nitty-gritty details, but Eve applied for the position of director of the St. Johns School Library in Waterloo, Belgium. Through a series of seemingly fated circumstances that included a message to call Belgium collect at 3am Toledo time (remember, this was before cell phones and commonplace international calling!), Eve was offered the job! Three days later she set off for Belgium to be a librarian in an English-speaking school run by French nuns who were all Irish! Eve had a wonderful experience in Europe. Paris was two hours away by train; there was a trip to England to buy books for the

school, as well as time spent in Germany and Luxembourg. Eve remembers that the Belgians were big beer drinkers (except for Hercule Poirot, a big one for a tisane) and there were lots of beer festivals. A Godiva chocolatier was right down the street, which is pretty cool since this was before Godiva was in every mall in the United States! After a year, Eve decided to head back to America. She realized that school librarianship was not where she wanted to spend her career, and she had accomplished what she set out to do—make the students excited about the library. Just imagine yourself as a kindergartner listening to Eve tell the *Chicken Little* story; it doesn't get more exciting than that, especially if you throw in a few Freudian slips with some of the other characters' names.

Returning stateside, Eve settled in Dallas where her sister was living. She had a short stint working in advertising before landing the position of branch manager in the Oak Lawn branch of the Dallas Public Library System. One highlight of her Texas experience was being invited to toss cow chips. I leave the visual for that activity totally to the reader's imagination. My only question is how do you keep your pink outfit pink? Eve enjoyed the social scene in Dallas, having a different sort of coming out party for herself!

After a few years, Eve moved back to Toledo and worked, again, for the Toledo Public Library System. She met Jane, her significant other, at this time. Jane had worked for Navy Armed Forces Radio as a hard rock DJ and newscaster, and now was the leading morning drive-time radio host in Toledo before going to law school. After graduating from law school, Jane became chief clerk to the Ohio State Supreme Court in Columbus. Eve became manager of magazines and newspapers (affectionately known as "mags and rags") for the Columbus Metropolitan Library.

So how did Eve end up at EBSCO? While in Columbus, Eve was recruited by Price Waterhouse's Management Horizon division to be a research/reference librarian, where she did online searches using their fabulous 9400 baud connection! You have to have been around awhile for that number to have significance. I remember being

excited about 2400 baud in the mid-1980s—that's the difference between corporate and academic libraries. However, corporate cutbacks meant the writing was on the wall for Eve's corporate library stint to be nearing an end. Eve got a tip from a former library school colleague that EBSCO was looking for a new representative. There is, naturally, more to the story; but, suffice to say, Eve got the job and realized it was the ideal job for her. Eve shared some great insights into what it's like to work as a vendor rep. Not everyone is suited for this type of position. In most cases, library positions in libraries are fairly structured; a vendor's job is not so structured, and you have to learn how to deal with that. You need to be self-motivated and accountable. You are out there on your own and must have the maturity and confidence to inspire your current and potential customers that your company can really provide the goods and services that you tout. In other words, you need to establish credibility. A really good sense of humor also goes a long way!

NASIG met Eve in 1995 at the 10th Anniversary Conference at Duke University. Eve had only been with EBSCO about a year, and had the good fortune of having Marcia Tuttle take her under her wing. Marcia was one of the great serials librarians of her era and knew loads of people. Eve quickly realized that "NASIG was made for her." She made lots of connections at the NASIG conference that quickly paid off. Everywhere she went, she knew someone or someone that that person knew. A common NASIG conference experience is one of the quickest ways to bond. Plus the informality of the conference is terrific! Eve has confidence that NASIG will be around for many more years. The organization has already shown it can evolve and change, and there are younger, newer people ready and willing to take the reins into the future.

I promised I would return to the Mary Manse story. Mary Manse was hit hard by the recession of the 1970s and unfortunately had to declare bankruptcy. Eve had been working as a reference librarian there when all of this came down. Ironically, Eve had written her master's thesis on establishing an archive, and the

archivist at Bowling Green University was her mentor. Eighteen months later Mary Manse closed and Eve had to ready the archives at Mary Manse for transfer to Bowling Green. Talk about full circle!

Eve is a proud honorary lifetime member of the Christian Librarians Association whose name tag has the Jewish star on it.

As to her personal life, Eve is very close to her sister, Barbara. They share a family resemblance for graciousness, humor and charm, although my understanding is that Barb is the charm-champion of the family. It sounds like the two of them get along like gang busters and even go on vacation together. Earlier this year Eve and her partner, Jane, went on a climbing vacation with Barb. Jane and Barb did the climbing, while Eve sensibly stayed at the hotel and read a book!

Eve and Jane have two dogs: Simba, a greyhound-collie mix; and Belle, a beagle-basset-dachshund-chihuahua - red tick-coonhound mix that they adopted in 2009. There are also some adopted rescue cats serving as additional playmates (or tormentors). The dogs go to doggie daycare, where they get to do fun things like splash in the kiddie pool on a hot day and play old beagle games! Eve has wide-ranging tastes in books and is usually reading about 2-4 books at a time. Some of her recent/current reads are: *Fortunate sons: The 120 Chinese boys who came to America, went to school and revolutionized an ancient civilization* by Liel Leibovitz and Matthew Miller, *The warmth of other suns: The epic story of America's great migration* by Isabel Wilkerson, *Acceptable loss: A William Monk novel* by Anne Perry, and *How to raise a Jewish dog* by Rabbis of Boca Raton, Barbara Davilman and Ellis Weiner. She is not much for TV or movies, except *Dancing with the Stars!* – remember the social graces have a special appeal. Eve enjoys the holidays, especially the fall and winter ones, and likes to cook and bake. Of course the best holidays are those where you can do all of this cooking and baking without being stressed and rushed! She can't wait to do more cooking in retirement. Eve is an avid public library user, and may look into

volunteering after retirement if she needs more things to do.

One other hobby of Eve's is weightlifting. Well, actually, more than just lifting weights -- I've seen photos of Eve punching away at the heavy bag and working on the rings. Eve delights in sharing that she once dead lifted 250 lbs and bench pressed 165 lbs three times!

Eve and Jane have been together for over 30 years, which is a pretty amazing accomplishment. After Jane's retirement in early 2012, they are considering relocating to Tucson, Arizona. Regardless of where they live, I'm sure they will be very active—knowing Eve's boundless energy I can't imagine her retiring to a rocking chair.

What has really struck me in getting to know Eve is that she epitomizes the personal spirit, free and respectful exchange of ideas, and unity of purpose that makes NASIG a special organization. Eve's NASIG is more than

just professional friendships—although she has plenty of those across the industry—but personal friendships, which make our sometimes crazy-beyond rational-belief serials world no less crazy, but a lot more FUN!



Columns

Checking In

Kurt Blythe, Column Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at kcblythe@email.unc.edu. Contributions on behalf of fellow members will be cleared with the person mentioned in the news item before they are printed. Please include your e-mail address or phone number.]

This particular column rarely requires an elaborate introduction, as NASIG's new members do a far better job of telling their stories than I ever could.

Such is certainly the case with **Crystal Alberthal**, who writes:

I fell into the library world completely by accident at the age of 19 and have been in the technical services part of libraries ever since. While I was attending junior college, I worked evening hours for a contract agency at the Microsoft Libraries in Redmond, WA doing everything "technical services." After five

years I was offered a job at the University of Washington Gallagher Law Library as a Library Technician. Eleven years, a marriage, a house, a lovely daughter and one Bachelor's degree later, I am now a Library Specialist. I help manage our online and print serials invoicing, subscriptions, databases and oversee receipt and processing of our serials material, to name a few. This past fall, our Technical Services Librarian alerted me to the NASIG Serials Specialist Grant and encouraged me to apply. I did and I was awarded the grant. It was an honor and a really great conference. I met some wonderful people. I plan on being a NASIG member for years to come. My current project is to get accepted into the University of Washington Information School for the fall of 2012 in hopes of getting my Master's degree in Library & Information Science.

Jose Luis Andrade, new to NASIG, is currently President, Swets Americas and has been working with Swets since 2004, when he was hired as Swets General Manager for Latin America. Since then he was promoted to President, Swets North America and then was given all

commercial responsibility for Swets Latin America as well.

Jose Luis came to Swets after working in various multinational companies including Exactus Corporation, eshare communications, inc. and Bentley Systems Inc., to name a few.

Jose Luis holds a B.S. degree from Ibero-American University in Industrial Engineering and completed the Harvard Business School Executive Management course. He is a member of the Board of Directors for the Friends of the National Library of Medicine, Special Libraries Association, and American Library Association. In addition, Jose Luis regularly contributes presentations and speeches to various publications and related industry forums. In his free time, Jose Luis stays busy trying to keep up with his 2 year old triplets.

Suzanne Barnes earned her MLIS in 1989 from the University of Oklahoma, but did not work with serials until she joined EBSCO Information Services in 2001. She currently serves as an E-Resources Account Development Manager for EBSCO's western region and specializes in e-journal package renewals and e-journal licensing. Before EBSCO, Suzanne worked at the University of Oklahoma Libraries, Tulsa City-County Public Library, the Gemological Institute of America Library, and was the research director at an executive recruiting firm.

Chris Bulock tells us:

I got my start in libraries as an undergraduate, first as a Mellon Intern and then working at the reference desk at the Occidental College library in Los Angeles. During that time, I also started working in electronic resources during downtime at the desk. While getting my MLIS at UCLA, I returned to the electronic resources department at Oxy for an extended internship. I graduated from UCLA in the spring of 2009 and by December, I had moved to the St. Louis metro area, working at Southern Illinois University Edwardsville as the Electronic Resources Librarian. I'm looking forward to getting involved in NASIG and connecting with other librarians working in electronic serials.

Tiffany LeMaistre got into serials by chance:

When I applied to be a student worker at the St. Edward's University Library, it wasn't my plan to become a librarian. I was just in the right place at the right time. As I was graduating with my BA in History, the Serials Department was expanding to make room for electronic resources. They needed a full time staff person and I needed a job. I loved the work and went on to get my MSIS from The University of Texas at Austin. I got involved with NASIG as a recipient of the NASIG Student Conference Grant. In June I attended my first NASIG conference and started a new job as the Electronic Resources and Collection Management Librarian at The University of Texas at Tyler. I had a great experience at the NASIG conference and I'm really looking forward to my continued involvement with the organization.

From **Camelia Naranch**:

My decision to become a "serialist" three years ago was as unexpected as the transcontinental move that took me and my husband from Baltimore to the San Francisco Bay area in the summer of 2008. That I have remained one ever since and am about to begin an MLIS degree at San José State University this fall has a lot to do with the fact that being a Serials Specialist at the Stanford Law Library is so personally rewarding, professionally challenging, and often simply a lot of fun! Even though I was prepared to continue as a cataloging or acquisitions specialist upon moving to Stanford, an advertised position in serials at the law school grabbed my attention. From the start, I loved the position and type of work that it involved. My supervisor and co-workers were warm and welcoming, and encouraged me to develop my skills further in the field. In fact, it was one of them who suggested that I apply for a NASIG conference fellowship, and wrote a recommendation on my behalf. Without her prompting, I never would have made the trip to Saint Louis this year to the NASIG conference. Seeing so many serials specialists there convinced me that I had chosen well and strengthened my resolve to begin my MLIS degree. I feel very fortunate that moving from the East to West coast also led me to transition into a specialized branch of library work in a law school environment where serial publications are essential to the work that the professors,

students, researchers, and other library patrons do. There is always something new to do each week when I arrive at my desk on Monday morning. And that's exactly how I like it!

Andi Ogier relates:

I began working with serials and e-resources when I started working at Virginia Tech in 2008. Prior to that point most of my experience was in book repair and preservation (yes, I was that girl who was always covered in glue and bits of buckram) and circulation (every academic library is at its most beautiful at 7:55am on a sunny Saturday) while I was (perhaps foolishly) gaining two masters degrees in Religion and Literature. I quickly found that serials and e-resources are not only interesting and fast-paced, but also involve working with the nicest and most supportive folks in the library world! At the moment I'm working full time at VT and I'm also about halfway through an MLIS degree through the LEEP program at the University of Illinois (U-C). Hopefully in another year I'll be joining the ranks of professional librarians! Wherever I end up, I know I'll be in good company, and I'm looking forward to seeing everyone in Nashville next year!

LaDonna Pierce gives her story:

I have been employed since February 2011 as the Content Management Librarian at the Milton S. Eisenhower Library of Johns Hopkins University. I am a cataloger responsible for serials, electronic resources and audio visual materials. Previously I worked as a Catalog/Metadata Services Librarian at Missouri University of Science & Technology, formerly known as University of Missouri – Rolla. I graduated from Kent State University in 2007 with my MLIS.

And, lastly (but not least-ly):

Greetings! My name is **Naomi Wolfson**. I am currently the Periodicals and Circulation Assistant at the Oakton Community College Library in Des Plaines, IL. I joined NASIG because I wanted to become more involved with other professionals within the serials field. In addition to joining NASIG, I was recently accepted to Dominican University's Graduate School of Library & Information Science Program.

Citations: Required Reading by NASIG Members

Kurt Blythe, Column Editor

[Note: Please report citations for publications by the membership—to include scholarship, reviews, criticism, essays, and any other published works which would benefit the membership to read. You may submit citations on behalf of yourself or other members to Kurt Blythe at kcblythe@email.unc.edu. Contributions on behalf of fellow members will be cleared with the author(s) before they are printed. Include contact information with submissions.]

Take note, gentle readers, this quarter's column expands on the concept of citations, citing the co-chairpersonship of Beth Johns at the Michigan Library Association's annual conference:

Beth Johns, MLIS

Co-chair, Michigan Library Association's "Academic Libraries 2011: Innovate, Collaborate, Connect."
May 5-6, 2011 at the Amway Grand Plaza, Grand Rapids, MI

Beth notes:

This is the second year our state association held this event. The conference attracted 128 registrants and two keynote speakers, including NASIG's own Rick Anderson (Steven Bell was the other); a special address by ACRL President, Lisa Hinchliffe; and eighteen breakout sessions on a variety of topics by association members.

Meanwhile, **Betty Landesman**, M.A., M.L.S., M.S., has published a review of Library, Information Science & Technology Abstracts (LISTA) in the "Tech Services on the Web" section of *Technical Services Quarterly* 28:2 (2011).

Valerie Ryder, MLIS, director of information strategy at Wolper Subscription Services, was a panelist at a fundraising workshop for public and school librarians, "Fundraising in an Era of Cuts," attended by dozens of librarians from Northeast Pennsylvania in June 2011.

Valerie has also been rather prolific, of late, publishing:

"The Metamorphosis of the Information Professional," Contributed paper, Annual Conference of the Special Libraries Association, Philadelphia, PA, June 15, 2011.

"Corporate Librarian's Survival Kit for Organizational Realignment." In *Best Practices for Corporate Libraries*, edited by Sigrid E. Kelsey and Marjorie J. Porter, 233-251. Santa Barbara, CA: Libraries Unlimited, 2011.

And

"Measuring Value in Corporate Libraries." In *Best Practices for Corporate Libraries*, edited by Sigrid E. Kelsey and Marjorie J. Porter, 193-212. Santa Barbara, CA: Libraries Unlimited, 2011.

Christine M. Stamison, MLIS, published an article

entitled, "Developing a Sound E-book Strategy" in *Information Today* 15:5 (July/August 2011).

Christina Torbert has also been active in the literature, publishing:

"Performance evaluations as motivation and training opportunities," in *Middle Management in Academic and Public Libraries*, edited by Tom Diamond. Santa Barbara, CA: Libraries Unlimited, 2011.

And

"To truly worship, Mozart's Requiem (1791)," in *Never Enough Singing: Essays in Honor of Seth Kasten*, edited by Melody Layton McMahon. Chicago, IL: American Theological Libraries Association, 2011

NASIG News

2012 Free Conference Registration Winner

Smita Joshipura, Chair, Evaluation and Assessment Committee

The Evaluations and Assessment Committee is pleased to announce the winner of the drawing for a free conference registration. The winner is Andrea Ogier, Serials Continuations Specialist, University Libraries, Virginia Tech.

Heartiest congratulations, Andrea!

NASIG Student Grants to be Named for Founding President John Riddick

During its June, 2010 meeting in St. Louis, the NASIG executive board voted to name the NASIG Student Grants after founding president John Riddick, who retired from Central Michigan University in 2004. In 1984 Riddick attended the UKSG conference and was inspired to form a study group to determine whether a similar group might work in the U.S. That study group met during the 1985 Midwinter meeting of the

American Library Association, and a further information meeting was held during the summer of 1985 at DePaul University. The initial group decided to move forward with a conference in 1986. An ad hoc Executive Council was formed, and John Riddick co-chaired that group along with Becky Lenzini. The 1986 conference was a rousing success, and the first NASIG election was held in November of that year. Riddick was elected president.

According to Tina Feick, another member of the original ad hoc Executive Council, the idea for the student grant program was Riddick's. The program was established during the 1987 conference at Denison University. The first recipients attended the 1988 conference at Oglethorpe University. The student grant program has been very successful in the years since then. A number of grant winners have gone on to become serialists, NASIG members and even a NASIG president! The executive board of 2010/2011 thinks it very appropriate to name this important NASIG program after our founder, first president and originator of the idea, John F. Riddick.

In Memoriam

John Merriman

It is with sad hearts that we announce the passing of John Merriman in his home of Charlbury, Oxfordshire, United Kingdom in early April. John was Managing Director at Blackwell's Periodicals, a well-respected subscription agency in the UK. In the late 1970's, John organized the first UK Serials Group conference and was instrumental in the founding of NASIG. As a matter of fact, he was affectionately called the grandfather of NASIG. He was a warm and welcoming individual with seemingly boundless energy. Eventually we discovered his secret—a power nap during the day! A brief obituary appeared in the Daily Telegraph (<http://announcements.telegraph.co.uk/deaths/132363/merriman>), and the July 2011 issue of *Serials* (the UKSG's official journal) contained some lovely remembrances. The joint NASIG/UKSG John Merriman Award was established to honor his enormous contributions to the success of both organizations.

Marla Edelman

We were sorry to hear about the recent death of longtime NASIG member Marla Edelman. From 1984-

1998, Marla was the serials librarian at University of North Carolina-Greensboro. Prior to coming to Greensboro, she worked in serials at the Chicago Public library and at SUNY-Binghamton. Both her BA and MLS were from the University of Illinois. She retired in 1998 to battle multiple sclerosis. Marla was very active in NASIG during her working career and was part of the site selection committee for the 10th Anniversary Conference at Duke University. Marla had a delightfully positive outlook on life and was a treasured friend and colleague to many.

You can see an obituary at

<http://www.blueridgenow.com/article/20110425/ARTICLES/110429908>.

Maureen Grant

It is our sad duty to inform you of the [recent tragic death](#) of Maureen Grant. Maureen was a librarian at the University of Wisconsin-Madison for 26 years. According to NASIG colleagues, she was a great storyteller whose presence will be sorely missed. Donations may be made to Friends of the New Glarus Public Library or the Green County Humane Society. <http://www.lively-nation.com/obits/wisc/124512349.html>

Serials & E-Resources News

One-Day UKSG Conference

The one-day UKSG conference this year is focusing on "Shared Services," a concept that is increasingly talked about in the scholarly communications sector. Prominent examples include centralised or consortial procurement (e.g. NESLi2) and collaborative cataloguing (e.g. OCLC).

Shared services are usually developed in order to improve quality, streamline functions, and save money. With severe funding cuts beginning to take effect in higher education, organisations such as SCONUL, HEFCE, and JISC, as well as individual universities and libraries, are planning to broaden the implementation

of shared services in order to achieve new cost savings. Publishers and suppliers are also experimenting further with collaborative approaches to business challenges, such as ORCID for author identification.

This one-day UKSG conference, chaired by David Sommer, will look back at lessons learned from past collaboration, both within and outside of the scholarly communications sector; consider the likely impact of current ventures; and explore how all stakeholders in the scholarly information supply chain can work together and make better use of shared services to achieve new efficiencies in the future.

Our programme of speakers includes:

- Ken Chad, on the pressure points in scholarly communications that shared services can relieve (both locally and globally), the main issues that drive their implementation, and the need for sustainability of projects.
- Anne Bell, university librarian at the University of Warwick, and chair of the SCONUL Shared Services Steering Group, on new HEFCE- and JISC-sponsored shared services for electronic resource management.
- Colin Cram, procurement consultant, on the history of shared services and lessons that can be learned from other sectors.
- Kristiina Hormia-Poutanen, Finland's deputy national librarian, on the progress of various shared services within the EU.
- Mike Taylor, principal investigator at Elsevier Labs, on collaborative science, ORCID, and how publishers might best pursue shared services in future.

In addition, there will be a session on unified resource management (URM). Speaker is to be confirmed.

The event will include a "Question Time"-style discussion with delegates able to submit questions in advance, as well as during the debate. The programme allows plenty of time for networking and will close with a drinks reception.

This event is aimed at anyone wishing to broaden their understanding of an area that will become increasingly relevant as well as anyone who is involved in or affected by the implementation of shared services.

The event is to be held on the 16th November 2011 at The Institute of Physics in London. The members' rate is £160+VAT and the non-members' rate is £120+VAT.

More information can be found at <http://www.uksg.org/event/NOVCONF2011>.

If you would like to attend, please either register your interest on the website or email me at tracy@tgm.ox14.com, and you will be notified when booking opens.

Kind Regards,

Tracy Gardner
UKSG Marketing Associate
www.uksg.org

Sarah Durrant Announced as Chief Executive of ALPSP

For Immediate Release
June 30, 2011

Oxford, UK

ALPSP, the international trade association for scholarly and professional publishers, announces Sarah Durrant is new Chief Executive.

The Association of Learned and Professional Society Publishers (ALPSP) is delighted to announce the appointment of Sarah Durrant as Chief Executive.

With members in 40 countries, ALPSP represents the scholarly and professional publishing industry to stakeholders and policy makers around the globe, provides a wealth of information and advice, best practice leadership and a variety of professional development and networking activities.

Sarah brings to ALPSP more than twenty years experience in scholarly publishing gained in a variety of roles at major publishing houses and related organizations. Since 2007 she has been Managing Director of Red Sage Consulting and for the past 3 years has served as Secretary General of the Association of Subscription Agents and Intermediaries (ASA).

Speaking of her appointment, Chair of the Council of ALPSP Toby Green said "We are very pleased that Sarah Durrant has chosen to join ALPSP. The Association will mark its 40th anniversary in 2012 and continues to grow and to go from strength-to-strength. Sarah is absolutely the right person to build on ALPSP's achievements and take the Association forward so that it can continue to serve the needs of the scholarly and professional

publishing community”.

Sarah Durrant said “I am delighted to be working for ALPSP. Ian Russell and the ALPSP team have done a tremendous job of raising the organisation's profile and enhancing understanding and knowledge of scholarly

publishing, inside the sector and beyond. I look forward to working with ALPSP members and to ensuring the Association continues to help them achieve their goals.”

Sarah replaces Ian Russell and joins ALPSP on September 1, 2011.

Executive Board Minutes

June 2011 Meeting

Date: June 1, 2011

Place: Hilton St. Louis at the Ballpark, St. Louis, MO

Attendees

Executive Board:

Katy Ginanni, President

Steve Shadle, Vice President/President-Elect

Carol Ann Borchert, Secretary

Lisa Blackwell, Treasurer

Members at-Large:

Patrick Carr

Clint Chamberlain

Steve Kelley

Buddy Pennington

Christine Stamison

Jenni Wilson

Ex officio:

Angela Dresselhaus

Guests:

Bob Boissy, incoming Vice President

Jennifer Arnold, incoming Treasurer-Elect

Stephen Clark, incoming Member-at-Large

Anne Mitchell and Michael Hanson, PPC co-chairs

Shana McDanold and Karen Darling, CPC co-chairs

Joyce Tenney, Site Selection

Regrets:

Rick Anderson, past President

Allyson Zellner, incoming Member-at-Large

1.0 Welcome (Ginanni)

1.1 Etiquette for Guests

The meeting was called to order 8:31 a.m. Board members introduced themselves and Katy covered etiquette for the meeting. Guests may participate in discussion but may not vote.

2.0 CPC (Pennington, McDanold, Darling)

CPC reported on a few last-minute details and logistics, including possible ADA issues. CPC is providing a list of options for alternatives the night of the ballgame, but there are a few ballgame tickets available still for those who want them. CPC expects to come in at or under budget.

There will be a membership table at the vendor expo. We do not have a tablecloth for NASIG for display tables. We might investigate this for next year, but we want to see results from the brainstorming session first in case of a possible name change.

3.0 PPC (Kelley, Mitchell, Hanson)

At this conference, there are nine strategy sessions, fifteen tactics sessions, two vision sessions, plus three preconferences. Poster sessions will be on Saturday. There are fourteen informal discussion groups this year. There will be lunch options available for purchase by discussion group attendees.

PPC expects to be at or under budget.

Concerns:

- Call for proposals: in Palm Springs, the call for proposals asked for ideas and loaded PPC with having to hunt for speakers. Maybe ask for ideas with speaker suggestions.
- Experimenting with only two vision sessions this year and no closing session. We'll do closing announcements during Sunday breakfast, and people can turn in badges at breakfast. We'll see how that affects Sunday attendance.
- Conference publicity seemed a bit scant this year. PPC asks that we work on better publicity for next year. PPR now has a manual specifically addressing conference publicity. Maybe in the PPC manual, there could be some note that in February PPC will create template information for the publicist to use as a teaser for the conference. There was a suggestion that all of the manuals be in a central place where committees can see each other's manuals to determine who is responsible for what. This will need to be discussed with ECC and may involve some programming issues.

ACTION ITEM: Carr, Arnold, Shadle, and Ginanni will work on providing mutual access to manuals for CPC, PPC, PPR, and the Past President.

4.0 Secretary's Report (Borchert)

4.1 Action Item Updates from March Conference Call

There were updates to action items as follows:

Not Done/In Progress:

ACTION ITEM: All board members will discuss how to turn the contingency planning documentation into a public document for distribution and discussion among the NASIG membership.

ACTION ITEM: Anderson will continue work with N&E over the course of this year to insure that the manual is complete and posted on the website. **ONGOING**

ACTION ITEM: Blackwell will add information to the treasurer's manual indicating that the board may

approve additional funding for the Merriman Award winner and the NASIG President to account for emergency situations.

ACTION ITEM: Chamberlain and Shadle will talk to ECC & CEC about working together on the Archiving Information section of the CEC-PPR proposal. **IN PROCESS**

ACTION ITEM: Chamberlain will ask E&A to poll vendors via email to see how NASIG could be more valuable to them/how the conference could be a more valuable experience. **IN PROCESS**

ACTION ITEM: Chamberlain will ask ECC and the Website Liaison to explore where we could add advertisements into the NASIG website without ArcStone intervention. **IN PROCESS**

ACTION ITEM: Ginanni will appoint or select members on FDC to work with advertisements. **IN PROCESS**

ACTION ITEM: Ginanni will draft a charge and job description for the NASIG Historian, run it by the board, and then appoint a Historian. **IN PROCESS**

ACTION ITEM: Ginanni will work with the Student Outreach Committee to create a formal proposal for the internship program.

ACTION ITEM: Ginanni will investigate obtaining an Outsell report to see if there is an environmental scan already done.

ACTION ITEM: Shadle will ask CEC to work with PPC to create something such as a podcast and/or website that explains the conference program proposal process. **IN PROCESS**

ACTION ITEM: Stamison will draft new language in conjunction with Wilson for the sections of the NASIG website that refer to personal memberships, and will send this to board for revision by end of December.

ACTION ITEM: Stamison will ask A&R to submit suggested rewording for 2012 student grant awards over the summer to better define the term “student.”

IN PROCESS

ACTION ITEM: Stamison will ask A&R to investigate the cost of travel insurance for flight, hotel, etc. in traveling to UKSG for Merriman Award. **IN PROCESS**

ACTION ITEM: Wilson will take the idea of thank you letters to new members back to MDC for consideration.

IN PROCESS

ACTION ITEM: Wilson will ask MDC to work with D&D to create a document outlining the idea of offering a conference prize to first-time members.

ACTION ITEM: Wilson will ask MDC to work with the Mentoring Committee to explore implementation of a year-long mentoring program in addition to the conference mentoring program.

Completed:

- All board members will review the Compensation & Reimbursement Policy on the Annual Conference web site to discuss possible wording changes.
- All board members will consider the issue of member information being shared with Tier One sponsors and how to communicate this to members.
- All board Liaisons will investigate and become familiar with process of doing an environmental scan.
- Anderson will ask FDC for pricing parameters for website advertisements.
- Ginanni will contact Ann Crosse and Lois Smith at SSP to see if they might be amenable to doing an event or conference together.
- Ginanni will contact Joyce Tenney to discuss a succession plan and training of the next person to handle Site Selection.
- Ginanni will ask SOC to send out a blast with information on library schools lacking library school ambassadors and rephrase page about library ambassadorship to show these as suggested activities, not requirements, and discuss ideas

about drafting a document outlining what it’s like to be a serialist.

- Ginanni will draft wording for how to present the two-word idea to the membership.
- Kelley will ask PPR to send letters to NASIG members and directors in conference region suggesting paraprofessional attendance at conference.
- Kelley will follow up with PPC to make sure it is in their manual to follow up before and after conference to get presentations online and/or on flash drives.
- Kelley will ask PPR to formulate a conference marketing plan.
- Kelley will discuss feasibility of providing feedback regarding rejected proposals with PPC and will ask if they feel comfortable accepting student proposals. They can work with SOC on the latter item.
- Shadle will tally words for the tag cloud via discussion on NASIG-L.
- Wilson will work with MDC to ensure they have a booth next year with membership brochures, etc. at the vendor expo.
- Wilson will ask MDC to add additional membership benefit information to website, such as NISO registration and *Serials Librarian* subscription discount.

4.2 Approval of Board Activity Report since March Conference Call

Shadle made a motion to approve the Board Activity Report with one addition included below, seconded by Stamison. All voted in favor.

3/11 **VOTE:** Ginanni made a motion to approve the statement of support from NASIG for the Association of Subscription Agents Library Choice initiative, seconded by Shadle. All voted in favor with one abstention.

4/11 The board reviewed and commented on a letter to be sent to state library associations publicizing the NASIG Annual Conference in St. Louis.

4/11 The board thanks and congratulates the *Conference Proceedings* editors on getting the 2010 annual *Conference Proceedings* published online! The editors did a stellar job on this!

4/11 **VOTE:** Borchert made a motion to approve the updates to the Compensation and Reimbursement Policy, seconded by Ginanni. A majority voted in favor with one abstention.

4/11 The board approved the new Annual Report template for committees, to be used starting in 2012.

4/11 **VOTE:** Ginanni made a motion to reappoint Joyce Tenney as conference coordinator for two years, with a term expiring at the end of the 2013 Annual Conference, seconded by Chamberlain. A majority voted in favor with one abstention.

4/11 The board discussed ideas for possible regional locations for the 2014 Conference.

4/11 The board commented on a letter to vendor members encouraging them to talk up NASIG when/as they can.

4/11 The board expressed great sadness at the passing of John Merriman, a founding member of NASIG, and discussed ways that NASIG could honor his accomplishments and contribution to NASIG.

4/11 The board agreed to discuss the NASIG name/vision/mission as the 2011 Brainstorming topic at the conference.

4/11 The board discussed a succession plan for the Conference Coordinator position currently occupied by Joyce Tenney and agreed to solicit applications for a Conference Coordinator-in-Training.

5/11 **VOTE:** Ginanni made a motion for NASIG to be a sponsor of the 10th Mid-South E-Resources Symposium, seconded by Borchert. All voted in favor.

5/11 **VOTE:** Carr made a motion to approve the roster of 2011/2012 committee appointments, seconded by Anderson. A majority voted in favor.

5/11 The board discussed and approved the draft of the position description for the new NASIG Photo Historian.

5/11 The board provided feedback to E&A on the test version of the conference evaluation.

5/11 The board asked ECC to add a page listing organizational members, which is now available.

5.0 Treasurer's Report (Blackwell)

The treasurer reports that the checking and savings accounts are earning interest, and it is much easier to work with Chase. We have \$503,737.86 total in accounts. Thirty-six organizations sponsored the NASIG conference for a total of \$57,455.00. The board greatly appreciates Anderson's work on sponsorship this year, and the support of our sponsors!

Committee expenditures are currently slightly over half of what was budgeted, which is good. Committee budgets run on a calendar year. Conference expenses will be reported separately.

The treasurer and treasurer-elect will be meeting to begin training. The board discussed how to handle ArcStone issues better. It might be time to do another RFP and see what our options are.

ACTION ITEM: Blackwell will ask website liaison to request a status update from ArcStone pertaining to development of their new platform.

6.0 Consent Agenda (All)

The following committee reports submitted to the board did not require any action or discussion. Stamison made a motion to accept the following reports, seconded by Chamberlain. All voted in favor.

Archivist
Bylaws
Conference Proceedings
CEC
FDC

MDC
Newsletter
SOC
Core Competencies TF

7.0 Site Selection (Ginanni, Shadle, Tenney)

We are in the process of preliminary requests for proposals for the 2014 conference to a variety of locations and have received numerous bids in return. The board recommended some geographic areas for Tenney to target. The idea of having a conference near a college but not actually on the campus was discussed.

8.0 Possibilities of Collaborating with SSP in 2014 (Ginanni)

The Society for Scholarly Publishing regularly meets in Washington, DC, Boston, and San Francisco. If we want to coordinate with them, we'll need to accommodate their city rotation, which does not appear to be flexible. We could have the meeting with overlap of one day at beginning or end of conference.

9.0 Conference Coordinator in Training (Ginanni)

A search committee has been appointed for CC in training: Ginanni, Shadle, and Boissy. The board provided additional feedback on the call for a new conference coordinator. Joyce Tenney has been able to attend meeting planner meetings inexpensively due to her location. The process will involve an application and phone interviews. We prefer NASIG members, since they would understand the organization's needs best. Applicants would need to be a member in order to do the job, but not necessarily to apply. The application will outline what to include in the cover letter and candidates will need to submit a resume. The successful candidate will shadow Tenney and be a member of the CPC listserv.

10.0 Sponsorship Final Report (Ginanni)

We need to publicize organizational memberships, which may help for next year. Crosscheck the registration database with organizational affiliations to

see how many vendor expo or sponsor people are attending the conference. Katy will suggest organizational membership to sponsors next year.

We continue to rely on sponsorship money to break even with conference expenses. We need to make the conference more attractive to members and make NASIG membership more attractive to non-members.

Perhaps we could approach well-received conference speakers for webinars or regional conferences? Could we live-stream and charge for individual sessions? Will this improve in future, or will budgets continue to be strained even if the economy improves? Sponsorships could serve as a good bridge, but we can't rely on them long-term to carry us. If attendance continues to drop, sponsorship and vendor participation might follow suit. Attendance in 2011 is higher than 2010, but still below historic levels, as is membership.

11.0 Survey for Vendors (Chamberlain)

Board reviewed the draft of a survey for vendors submitted by the Evaluation & Assessment Committee and suggested changes.

12.0 Awards & Recognition Issues (Stamison)

The call for awards has been moved up due to the Merriman Award schedule. A&R suggests moving the call for the other awards back to normal to bring in more applicants. Currently the schedule conflicts with the winter holidays.

Student definition—does it have to be an MLS degree or can we broaden? The board is happy with the suggestion from A&R to include post-MLS degrees or related field.

As far as the number of coursework credits, rather than limiting the award to students with 12 course credit hours or less, students should be currently enrolled at time of application.

13.0 Past-Presidential Leeway in Bartering Conference Sponsorships (Ginanni)

There should be a vendor representative on CPC to help with the vendor expo and making sure the needs of vendors are met. The board agreed that the past president will have the authority to negotiate in terms of tiers with sponsors when necessary. This should be reflected in the sponsorship manual which will be shared with CPC, PPC and PPR.

14.0 CEC Survey Results (Shadle)

Shadle shared the results of the CEC survey regarding areas of interest from the membership. Webinars were a popular form of information delivery, with in-person events being next.

ACTION ITEM: Clark will ask CEC to investigate online learning tools for webinars. Asking other library organizations already using this might be a good place to start.

ACTION ITEM: Clark will ask CEC to put out a call for volunteers to help set up webinars over the next year and to work with this year's PPC to get names and proposals.

ACTION ITEM: Stamison will check with Swets to see if we can piggyback on their GoTo meeting license for webinars and involve them as a cosponsor in that fashion.

ACTION ITEM: Ginanni will check with EBSCO to see if we can piggyback on their WebEx license for webinars and involve them as a cosponsor in that fashion.

ACTION ITEM: Clark will ask CEC to work with PPC to identify content and use survey results to potential locations and organizers.

15.0 Continue *NASIGuides*? (Kelley)

PPR is concerned about acquiring new *NASIGuides* and questioned whether they should be continued. If so, we need to market them better. The board agreed to

let *NASIGuides* continue if someone volunteers, but there is no need to seek out authors for new ones. Instead, frame an e-publication around the core competencies task force with chapters coming from their work.

16.0 Declining Membership Numbers (Ginanni, Wilson, Boissy)

If half of the membership could bring in a new member, that would help. We could offer some prize or incentive. Previously, there were state regional councils with representatives in each state who could promote NASIG at regional meetings, with or without a table with brochures.

Do we want to continue the membership brochure? Maybe do flyers instead and print as we go along, with a link to the website with current information. We could put a QR code on the flyer, which is free unless we want to collect stats, etc. for that page.

Add to membership form: Did a NASIG member refer you? If so, who? We'll need a name to give credit toward a prize.

ACTION ITEM: Boissy will ask MDC for ideas for increasing membership by fall board meeting.

17.0 Website Usage Statistics (Chamberlain)

The jobs page gets a lot of hits, more than main page. Most of the highest hit pages are related to the conference, though one is the "About NASIG" page. The NASIG blog is also getting a lot of usage.

Could we get a plug-in added with a Twitter feed about NASIG? We have no link to the NASIG Facebook page on our home page. We should investigate what it would take to get this sort of thing done.

ACTION ITEM: Blackwell will have Abigail ask ArcStone about plug-ins and widgets on the webpage.

18.0 N&E Issues for Board (Ginanni)

The board suggested dropping the to-do item regarding compiling a list of past board members.

The board decided officially not to make a bylaws change to have open elections and wishes to keep the current nominations process.

We already have a contingency in place for handling the voting process. This year, we'll use ArcStone and allow them time to test properly, and if there is a problem, use SurveyMonkey.

ACTION ITEM: Ginanni reminds N&E that it is critical for Abigail to ask ArcStone to test online voting before making it public.

19.0 Other Business (All)

19.1 Training Program Sponsorship Opportunity

ACTION ITEM: Ginanni will clarify the item regarding a training program sponsorship with FDC next year to determine if they meant our current grants and awards, which are already opportunities for sponsorship.

19.2 Do We Want to Name the Student Awards after John Riddick?

John Riddick was a founding member, and the student grants were his idea. Stamison made a motion to rename the Student Awards the John Riddick Student Awards, effective with the 2012 conference, seconded by Kelley. All voted in favor. This will not be announced until we have cleared it with John Riddick.

ACTION ITEM: Ginanni will follow up with Tina Feick regarding renaming the student awards. Feick was asked to contact John Riddick.

19.3 In honor of John Merriman's service to NASIG, the Board will send \$100 to one of the organizations suggested by John Merriman's family.

19.4 Do away with Poster Sessions?

Joyce Tenney suggested eliminating poster sessions due to expense, time involved, and a low number of proposals. We could also do a virtual poster session with a .pdf of what would have been the poster instead of a physical poster session. Maybe keep them up for 3 months.

ACTION ITEM: Ginanni will send a message to NASIG-L asking if there are any major objections to eliminating the poster sessions from the annual conference.

20.0 Contingency Planning Discussion (All)

20.1 Turning Contingency Planning Documentation into Public Document for Membership

ACTION ITEM: Borchert, Pennington, and Dresselhaus will draft a version of the contingency planning document for the membership in bullet list form.

The format for the document will include the Contingency followed by a list of action items, using the Contingency Planning Task Force document as a framework. We could release the full document then put pieces on NASIG-L and the blog, or do reverse. We'll release bits and then put them together at the end.

The group will collect feedback to bring back to board and/or committees. We can search archives by subject line. Have all discussion on NASIG-L. Post something on the blog to announce the conversation on NASIG-L.

20.2 Sponsorship, Membership, Conference Attendance

We could create a bullet point list of what makes us different from other organizations. What makes us stand out? Give that to MDC to push out in

communications (flyers, etc.). We could also put rotating testimonials on front webpage with pictures.

Keep the brand but drop the acronym and add a tagline so people know what it is. Serials are any continuing resource, which now includes most types of e-resources.

- NASIG: Redefining Serials
- NASIG: 75% of your materials budget
- NASIG: Theoretical foundation. Pragmatic problem-solving

Kelley made a motion to adjourn the meeting, seconded by Stamison. All voted in favor. The meeting adjourned at 4:24 p.m.

Minutes submitted by:
Carol Ann Borchert
Secretary, NASIG Executive Board
June 14, 2011

Minutes approved by the NASIG Executive Board on
June 27, 2011

Treasurer's Report

Lisa S. Blackwell, NASIG Treasurer

August 2011

NASIG committees have done an outstanding job of controlling expenses during this difficult economic climate. Due to fiscal prudence and the excellent conference sponsorship recruitments by Past-President Rick Anderson, our organizational budget is healthy.

Balance Sheet

(Includes unrealized gains)

As of 08/12/2011

ASSETS	Monies	Interest rate
JPMorgan Chase Brokerage	\$51,082.86	NA
Chase accounts		
Business Checking - 4961	\$7,700.31	0.01%
High Yield Savings – 1652	\$336,771.38	0.25%
LIABILITIES	\$0.00	
EQUITY	\$395,554.55	
TOTAL LIABILITIES & EQUITY	\$395,554.55	

*The NASIG budget runs on a calendar year for tax purposes.

Conference Financials

2011 Conference Financials - Finals	Expenditure	Income
Logo design	\$200.00	
A-V Services	\$17,683.09	
Speaker Conference Housing	\$1,653.12	
Food Services (Hotel + City Museum)	\$76,366.36	
Opening speaker honorarium	\$250.00	
Speaker fees	\$4,000.00	
Speaker travel costs	\$1,050.80	
Registration table items/supplies	\$1,135.32	
Display panels	\$382.50	
conference drawing award	\$100.00	
café press prizes	\$40.00	
café press sales		\$44.62
City Museum	\$4,000.00	
Supplementary insurance	\$375.00	
Preconference registrations		\$8,375.00
Conference registrations		\$99,097.00

Guest reception tickets		\$1,260.00
Ballgame tickets	\$4,400.00	\$4,350.00
2011 Conference Financials – Finals (cont.)	Expenditure (cont.)	Income (cont.)
Conference/Baseball refunds	\$1,882.50	
Ballgame tickets cash		\$200.00
Coaster sales cash		\$56.00
Sponsorship dollars		\$57,455.00
Hotel Rm revenue rebate		\$2,314.26
	-	
Final Totals	\$113,518.69	+\$173,151.88
Bottom Line		+\$59,633.19

2011 Committee Budget Expenses to 8/12/2011

Committee	Budgeted Amount	YTD Expenditures
Administration	\$17,550.00	\$8,820.68
Archives	\$250.00	\$0.00
Awards & Recognition	\$23,445.00	\$11,861.03
Bylaws	\$60.00	\$0.00
Continuing	\$3,000.00	\$2,750.00

Education		
Conference Planning	\$2,600.00	\$1,083.31
D&D	\$495.00	\$0.00
Electronic Communications	\$22,500.00	\$10,076.25
Evaluation	\$150.00	\$0.00
Financial Development	\$200.00	\$0.00
Membership Development	\$1,380.00	\$30.39
Nominations & Elections	\$250.00	\$58.56
Proceedings	\$190.00	\$107.20
Program Planning	\$1,250.00	\$888.21
Pub PR	\$60.00	\$0.00
School Outreach	\$50.00	\$0.00
Committee (cont.)	Budgeted Amount (cont.)	YTD Expenditures (cont.)
Site Selection	\$2,000.00	\$291.90
BUDGET TOTALS	\$75,430.00	\$35,967.53

* General treasury expenses/income (including conference monies) not included in these totals.

Committee Reports

2010/2011 Mentoring Group Annual Report

Submitted by: Sarah Sutton

Members

Sarah Sutton, chair (Texas A&M University-Corpus Christi)

Taryn Resnick, vice-chair (Texas A&M University Medical Sciences Library)

Stephen Clark, board liaison (College of William & Mary)

Continuing Activities

The mentoring forum on the NASIG web page continued to show little activity. The Group has not conducted an official analysis to determine why this is the case, but notes that there is relatively little activity in any of the NASIG forums. The return of NASIG-L may have had some impact.

The Mentoring Group will complete its committee manual this year.

Completed Activities

The mentoring program at the 2011 Conference was an overall success. Twenty-eight mentor/mentee pairs were matched prior to the conference, and an additional twelve pairs were matched during the First Timers/Mentoring Reception on the first day of the conference for a total of 80 participants (40 pairs). This is a significant increase over 2010 and is likely due in part to the 2010/11 chairs being prepared to make matches during the reception based on the 2009/10 chairs' experience.

The First Timers/Mentoring Reception was well attended by mentors and mentees, as well as some first time attendees who had not registered as mentees before the conference. However, there were few experienced NASIG conference attendees at the reception, which made making on-the-spot matches somewhat more difficult. This might be avoided in the future by putting out a call to those experienced NASIG conference attendees and inviting them to attend the reception, even if they are not paired with a mentee prior to the conference. Our thanks goes to those NASIG conference attendees who did attend the 2011 reception (including several Board members) and were gracious enough to step in as mentors at the last minute.

After the 2011 conference, the Mentoring Group conducted a survey of 2011 mentors and mentees about their experience. The survey was conducted via the NASIG Survey Monkey account and we received a total of fifty responses (a 62.5% response rate since all mentors and mentees, including those who were paired on-the-spot at the conference, were invited to respond). A summary of their responses is included below:

- Twenty-seven mentors and twenty-three mentees responded to the survey.
- 95% had been paired prior to the conference and had contact with their partner prior to the conference.
- 100% of mentors and 84.2% of mentees responding attended the reception.

- In answer to the question "What did you enjoy most about the Mentoring / First Time Attendee reception?" mentors and mentees reported:
 - Meeting their mentees and other mentor/mentee pairs, networking.
 - The casual atmosphere.
 - The food.
 - Ease of finding and talking with their mentees.
 - Organizing tables by name made it easier to find my mentor/mentee.
 - "I joined my mentor at a large table of veteran attendees and very new librarians, so it was a great mix of experiences. I particularly enjoyed hearing about NASIG adventures back when folks stayed in college dorms."
 - "Talking with both mentors and people attending the conference for the first time. After that meeting, I felt much more comfortable the rest of the week."
 - Having a "friendly face" to connect with during the conference.
- In answer to the question "What can we do to improve the Mentoring / First Time Attendees reception at next year's conference?" mentors and mentees reported:
 - Tables weren't big enough, not enough tables but also "having so many tables makes it so people cannot socialize as widely."
 - Distribute mentor/mentee ribbons before the reception.
 - "Having on the spot mentors was also a good idea."
 - Overlapping with the vendor expo didn't leave enough time to enjoy both events.
 - Hold a "Mentoring/First Time Attendees breakfast space to give folks a scheduled time to reconnect."
 - Provide more description of how to find your mentor/mentee at the reception ahead of time.
 - Ice-breaker games, starter questions to encourage conversation.
- Most agreed that pairings made before the conference were preferable.
- 79% (38) rated their overall experience as "good" or "great," 17% (8) rated it as "ok, neither great nor terrible," and 4% (2) rated it a "poor" experience. Based on their other comments, it appears likely that those who had a poor experience were those who had little contact with their mentor/mentee after their initial meeting.

The incoming chair, vice-chair, and board liaison met during the conference to plan activities and activities for the upcoming year. These included conducting and analyzing the Mentoring Post-Conference Survey, writing the group's annual report, and completing the group's committee manual.

Budget

The Mentoring Group does not require funding for its activities for 2011/12.

Submitted on: July 25, 2011

2010/2011 Program Planning Committee Annual Report

Submitted by: Anne Mitchell and Michael Hanson

Members

Anne Mitchell, chair (University of Houston)
Michael Hanson, vice-chair (Lafayette College)
Michael Arthur, member (University of Central Florida)
Morag Boyd, member (Ohio State University)
Rubye Cross, member (Georgia Institute of Technology)
Karen Davidson, member (Mississippi State University)
Cris Ferguson, member (Furman University)
Chandra Jackson, member (University of Georgia)
Jean Sibley, member (College of William & Mary)
Danielle Williams, member (University of Evansville)
Paoshan Yue, member (University of Nevada, Reno)
Steve Kelley, board liaison (Wake Forest University)

Narrative of Activities since Last Report

2011 Conference Program Slate

The main business for the Program Planning Committee in 2010/2011 was to develop and oversee the execution of the program for the 2011 conference.

1) Vision Speakers

Two vision speakers were selected through discussions

among the PPC and Board. Adam Bly and Paul Duguid were the slated vision programs.

2) Strategy and Tactics Sessions

The strategy and tactics sessions were filled through two calls for proposals and ideas. A total of 46 proposals were received; 27 from the first Call and 19 from the second Call. In committee deliberation, PPC made the decision not to combine programs on similar topics, but to select the strongest proposal. In the end, a slate of 12 strategy and 16 tactics sessions, with a total of 28 programs, was approved. The final slate (http://www.nasig.org/conference_program.cfm) consisted of 9 strategy and 15 tactics sessions. As the conference approached, there were the usual incidental changes to speaker line-ups and program abstracts.

3) Preconferences

The 2011 conference offered three preconferences: a full-day RDA preconference held on Wednesday, June 1, a half-day preconference on budgeting fundamentals held on the afternoon of Wednesday, June 1, and a half-day troubleshooting preconference held on the morning of Thursday, June 2. The RDA preconference reached maximum registration of 25, the trouble shooting preconference had 37 registrants (cap was 40), and the budgeting fundamentals had 14 attendees.

4) Posters

In response to the call for proposals, 7 poster proposals were received. Posters were available 9am - 4pm on Saturday, June 4, with presenters available to discuss their posters during the afternoon break. The poster sessions were particularly strong this year.

5) Informal Discussion Groups

PPC handled Informal Discussion Groups (IDG) differently this year based on prior conversation with the Board. It has been the opinion of the PPC chairs that PPC intervention in this type of informal programming was both inappropriate, and an unnecessary distraction to PPC at a time when we need

to focus on the formal programming. This year PPC opted to accept all groups as proposed, and invite conference attendees to indicate their areas of interest in order to allocate rooms efficiently. This system worked particularly well, and PPC plans to continue organizing IDG in this manner.

6) Other Program Content

PPC's involvement in other program content, such as the Vendor Expo, is limited to managing the schedule.

7) Schedule

Another responsibility of PPC is setting the daily schedule for conference events. The start time for official events was 9am, with the Friday business meeting and the Saturday committee meetings occupying no-conflict times. Informal Discussion Groups were moved back to a lunchtime slot so as not to occupy time that could be devoted to formal programming. This conference we had five Tactics timeslots rather than three, to reduce the number of overlapping programs. We hoped this would provide a richer experience for the many conference-goers who are not involved in NASIG business functions.

Reimbursement Guidelines and Speaker Costs

8) Strategy and Tactics Session Reimbursement

Under the reimbursement guidelines that were updated last year (http://www.nasig.org/conference_compensation.cfm), up to three speakers per strategy session are eligible for full registration waivers, and up to two speakers per tactics session are eligible for half-price registration. Twenty strategy speakers accepted conference registration waivers. This could be valued at \$7,500, given a member registration rate of \$375. Eighteen tactics speakers accepted half-price registration. This could be valued at \$3,375. The total cost of waivers, \$10,875, is slightly higher than last year's \$9,975, but still markedly lower than in previous years. This may be attributed to new limits on the per-program number of

speakers who may receive compensation, and a general shift away from large panels of speakers.

9) Vision Speaker Costs

For vision speakers, compensation packages were individually negotiated. Vision speakers' expenses for honorarium, travel and lodging expenses, and waived registrations came to \$5,601.84, which is less than last year's estimated vision speaker costs of \$5,950.

10) Preconference Speaker Costs

For preconference speakers, the standard compensation is half-price conference registration and two nights lodging, but compensation was negotiated with invited speakers. Costs amounted to \$2,414.58. CPC had associated costs for AV, catering, etc. and we incurred some modest costs for materials. The preconferences sold well, and we assume that they made money.

11) Other Activities

As noted in previous Board reports, PPC had a number of other activities this year:

- Considered the report from Evaluation & Assessment from the 2010 conference in developing the schedule and program slate.
- Updated the PPC manual. A complete revision of the manual is planned for the second half of 2011. Anne Mitchell has volunteered to take on this project after concluding her term as chair.

12) Current Activities

- Distributing Call for Proposals for 2012 conference.
- Collecting names for Vision Speakers.
- Collecting ideas for Preconferences.

13) Acknowledgments

We would like to thank all the committee members for their hard work in bringing together an exciting program for the NASIG membership. Steve Kelley was invaluable as our Board Liaison, and we appreciated his efforts in keeping us all moving forward. We are

pleased to have Karen Davidson as our incoming Vice-Chair for 2011/2012.

Recommendations to Board

- Evaluate timing of PPC's annual report. Anne has been out of the chair position for a couple of months, yet the majority of work reported on in this document deal with her work the past year. What is more, many changes have already been instituted post-conference/pre-call for proposals. Though everyone wants a break after the conference, perhaps the time for PPC's annual report is soon after the conference.

- Continue to address the issue of conference publicity. We saw very little publicity for last year's conference, which was disappointing given the work that NASIG speakers and planners put into bringing the conference to fruition. Given that the annual conference is NASIG's most visible and significant product, there is a great need for thoughtful, well-timed publicity, and we believe there is more that can and should be done to further this aim.

Submitted on: August 15, 2011

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In 2011, the *Newsletter* is published in March, May, September, and December. Submission deadlines (February 1, May 1, August 1, and November 1) are approximately 4 weeks prior to the publication date. The submission deadline for the next issue is:

November 1, 2011

Send submissions and editorial comments to:

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